



Workforce Planner Tool

User Guide
Non-Government Organisations

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User guide — Workforce Planner Tool

The Workforce Planner Tool is the first of three tools designed to support NGOs' human resource management functions. It is based on Disability Services Queensland's Workforce Planning Guide and has been modified to suit NGOs' needs.

The tool is structured as follows:

- topic overview
- link to the data entry screen from the topic overview screen, and
- stepped approach to the creation of the Workforce Plan.

The document *Workforce Planning Guidelines — A tool kit for Non-Government Organisations to plan future workforce needs* supports the Workforce Planner Tool. It is also located on the Community Door if you wish to download a printable version.

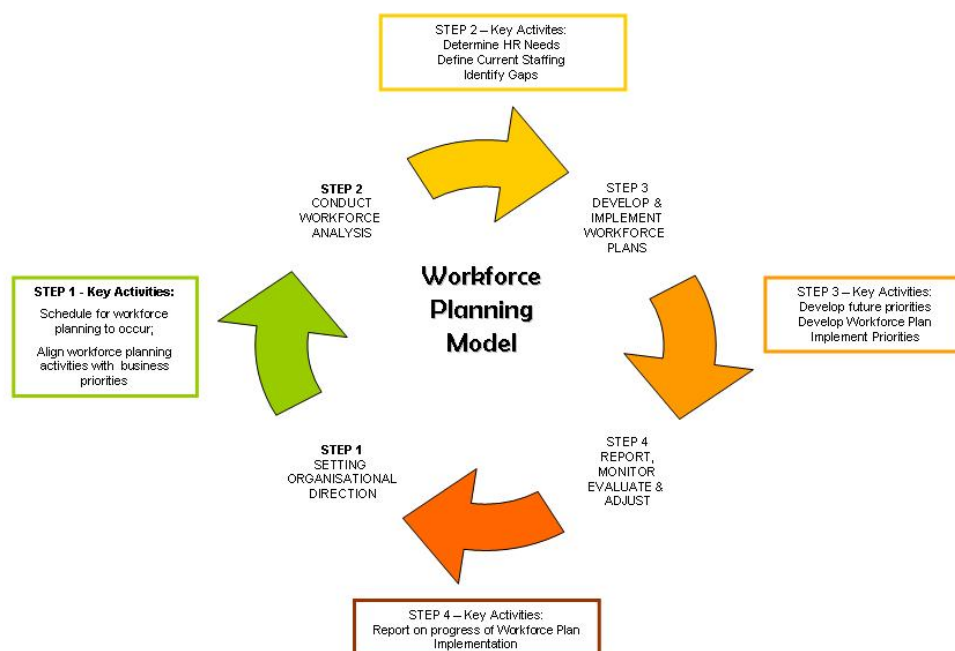
1.1 Purpose

This document supports the implementation of the Human Resource and Training Assist — Workforce Planner Tool. It includes a number of excerpts from the tool to illustrate the stages in developing a workforce plan. Do note that not every component of the workforce plan needs to be completed. The tool is designed to facilitate the processes required to create your workforce plan and should not be seen as a definitive guide.

1.1.1 Workforce planning processes

Before working with the online version of the tool it is important to consider the theory-based information provided, especially if you have not previously undertaken workforce planning. This background material is published in *Workforce Planning Guide — A tool kit for Non-Government Organisations to plan future workforce needs*.

The following diagram represents the four major components of the workforce planning process.



The remainder of the guide follows the steps and activities outlined above to ensure consistency across workforce plan resources.

2 Before getting started

To start using the tool, it is important to ensure your administrator has set up your user profile and the relevant configuration components. If you cannot identify your administrator, have any queries about registration or information contained in this document, please email sngos@communities.qld.gov.au

Getting started

This section provides you with start-up information needed to use Human Resource and Training Assist tools this, and other tools within the HR & Training Assist suite, and to ensure the relevant information has been conveyed prior to accessing the Workforce Planner Tool.

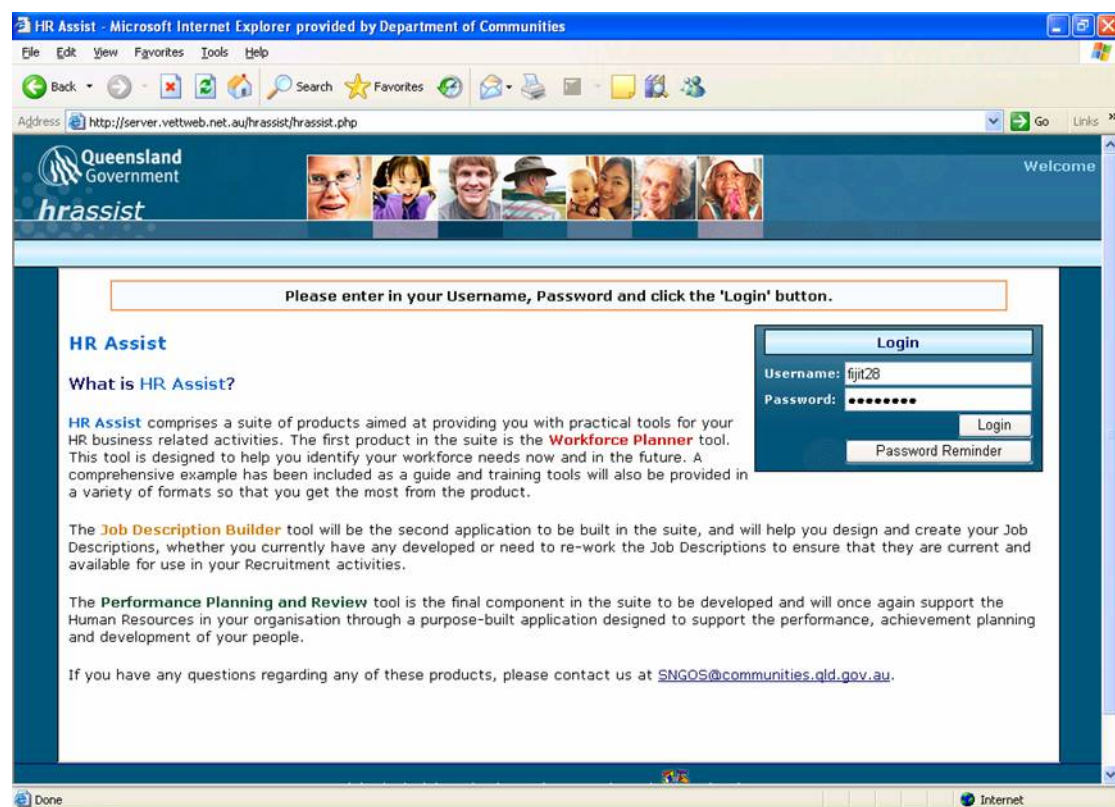
2.1 Setting the scene

To give users a practical understanding of how to use the tool, this guide profiles a fictitious case study, By the Bay Counselling Service. With a local provider of counselling services to men about to retire, the organisation needs to establish how it can fill the gap in service provision.

2.2 Log in

By now, your Human Resource and Training Assist administrator should have sent you an email containing your user name and password and your level of access should have been established. If you have any questions about the information you can email sngos@communities.qld.gov.au access, direct these to the administrator in the first instance.

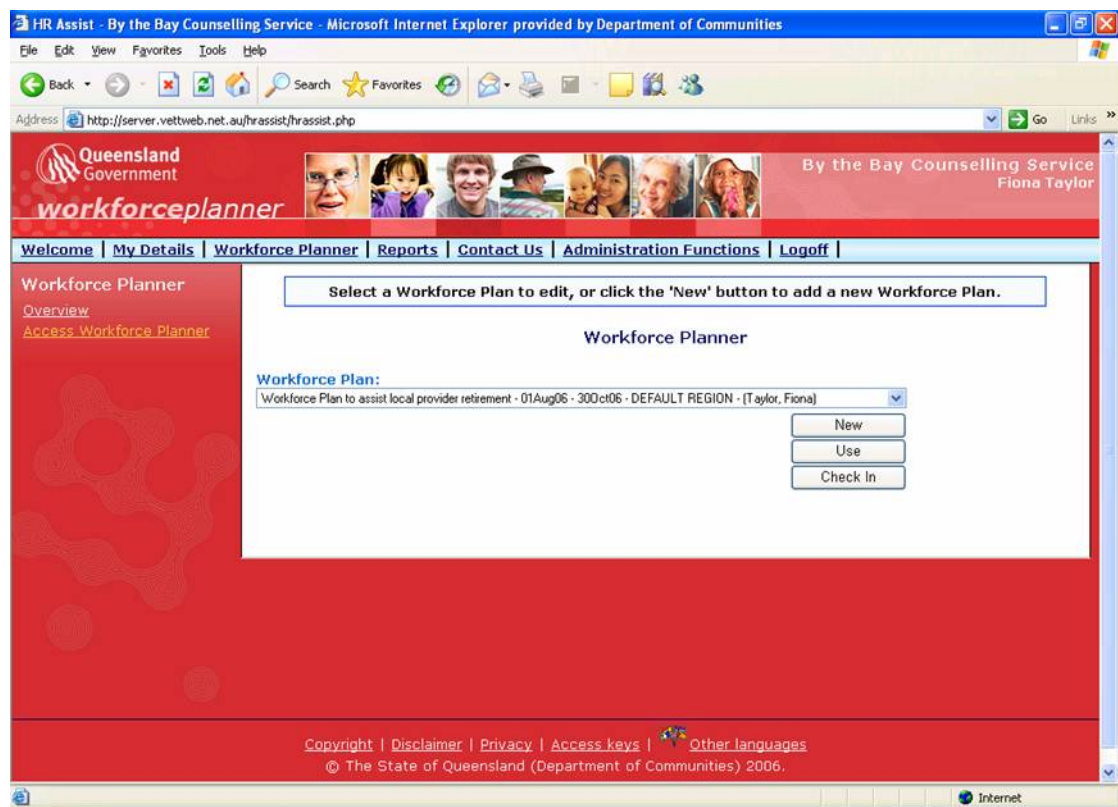
To log in, enter your user name and password as indicated in the screen below:



Human Resource and Training Assist log in screen

2.3 'Check in' and 'check out' requirements

The Workforce Planner Tool is based on a shared database. This means data must be 'checked out' while being edited. When a user is finished editing their workforce plan, they must 'check-in' the workforce plan to make it available for other users. These tasks are performed at the initial workforce plan screen, and by selecting 'workforce planner' from the primary navigation toolbar.



Workforce plan details screen

3 User guide structure

This user guide follows the same structure as the *Workforce Planning Guidelines*. Detailed information about workforce planning and the reasons for completing the various steps and topics is contained within the guidelines and is not repeated in this user guide. The user guide provides an example of how to use the system and takes you through the steps available when using the Workforce Planner Tool.

A fictitious example provides information on which to base a workforce plan. The case study features the By the Bay Counselling Service. References to this service are solely to provide a working example of how to use the tool, as is the detail within the service's plan as it is developed.

If you have any feedback about this guide or any other elements that support the implementation of Human Resource and Training Assist, specifically the Workforce Planner Tool, please contact SNGOS@communities.qld.gov.au

4 Step 1: Setting organisational direction

This step addresses the following components:

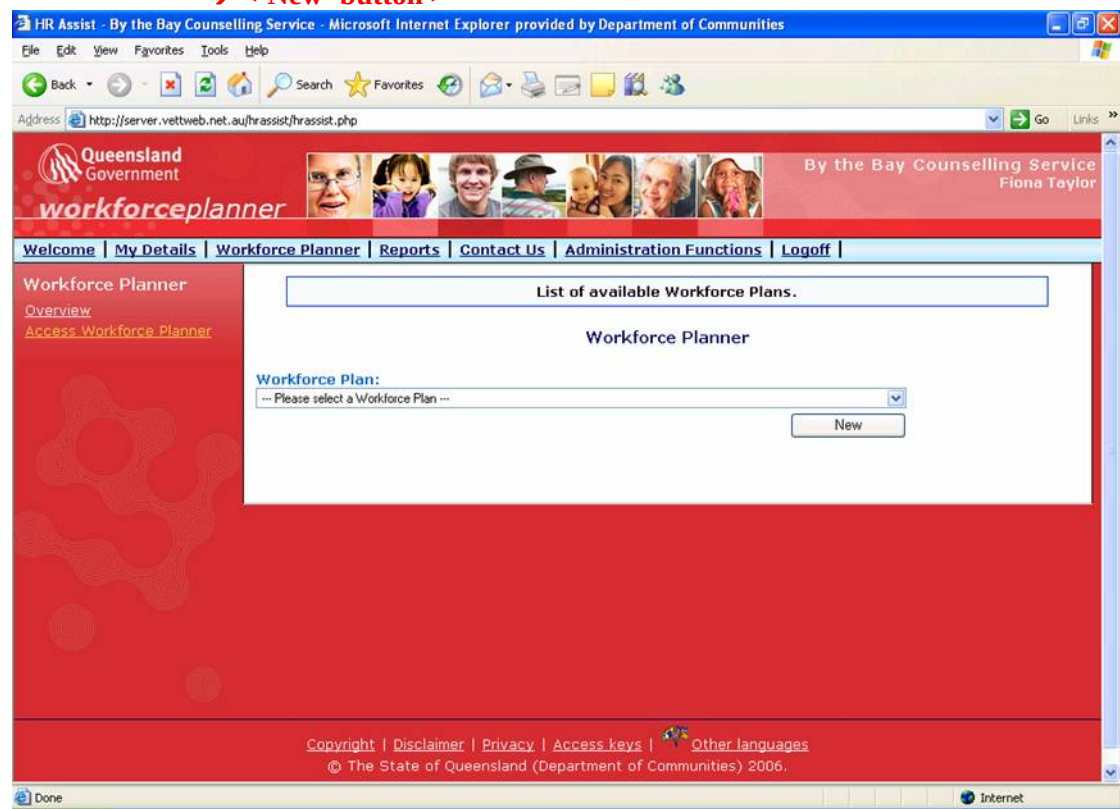
- developing a schedule to plan activities to create your workforce plan
- SWOT analysis (government organisations do not need to undertake this activity as the process is conducted as part of the business planning cycle), and
- risk analysis and aligning workforce planning and organisational planning activities.

It is also important to determine the time period the workforce plan will span so it may be included when creating the workforce plan detail information.

4.1 Create the workforce plan

To create the workforce plan select:

Human Resource and Training Assist
→ **Workforce Planner**
→ **<'New' button >**



Workforce plan details screen

Complete the relevant details for your workforce plan and press the 'save' button. Once a workforce plan has been created, access it by selecting the 'use' button. Remember it is important to 'check in' the workforce plan when you have finished updating it. If you do not 'check in' the plan, other team members will be unable to access it and make their updates.

Workforce plan details screen

Once saved, you can proceed with the detail to support the workforce plan and will be presented with a screen similar to the one that follows. At this point you also have an opportunity to update the information.

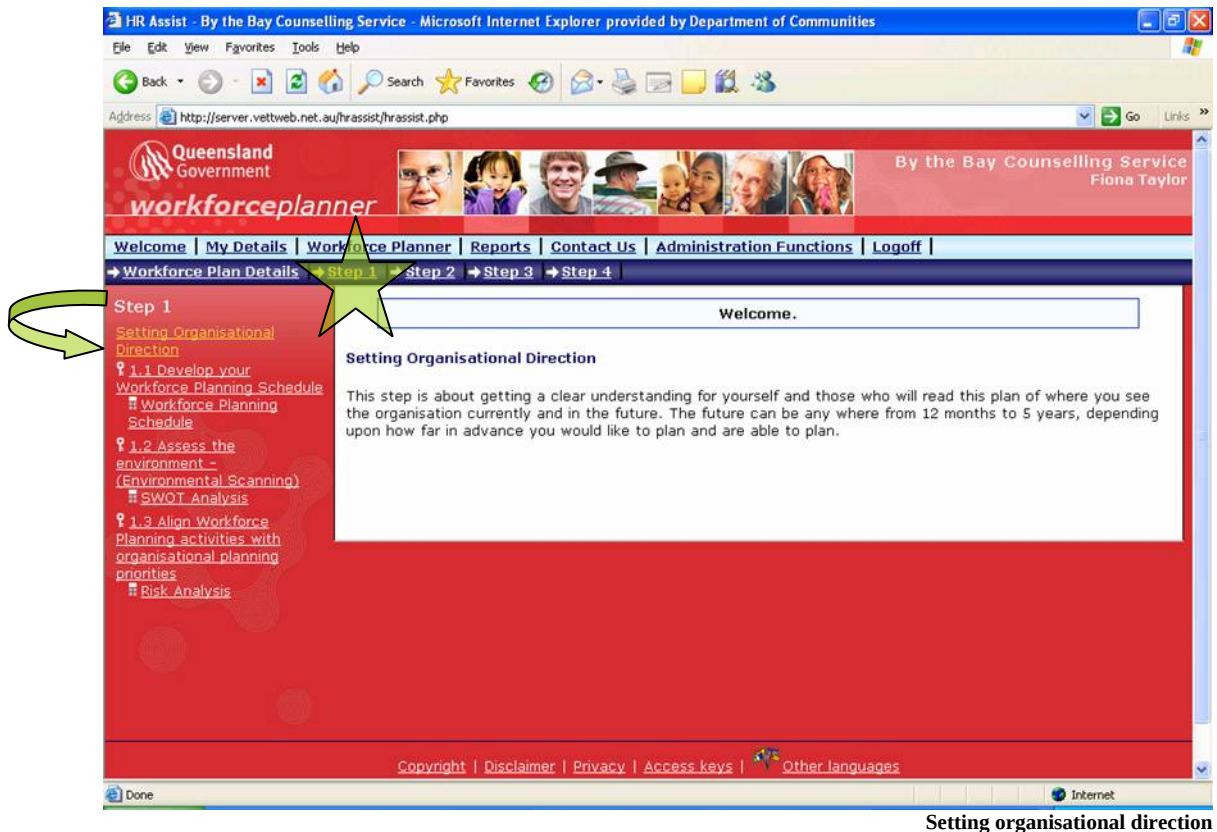
Workforce plan details screen

Once the workforce plan has been created at the organisation level, you can now work systematically through the steps required to finalise your workforce plan. Note that not all steps are required and the only mandatory screen is the workforce plan details screen, which you have just completed. This is only an overview screen and does not provide real analysis

of issues to address nor details needed to implement the strategy. However, it is not necessary to complete all screens and it is at your discretion as to whether the information contained from this point on is relevant to the plan being developed.

4.2 Step 1: Overview — setting organisational direction

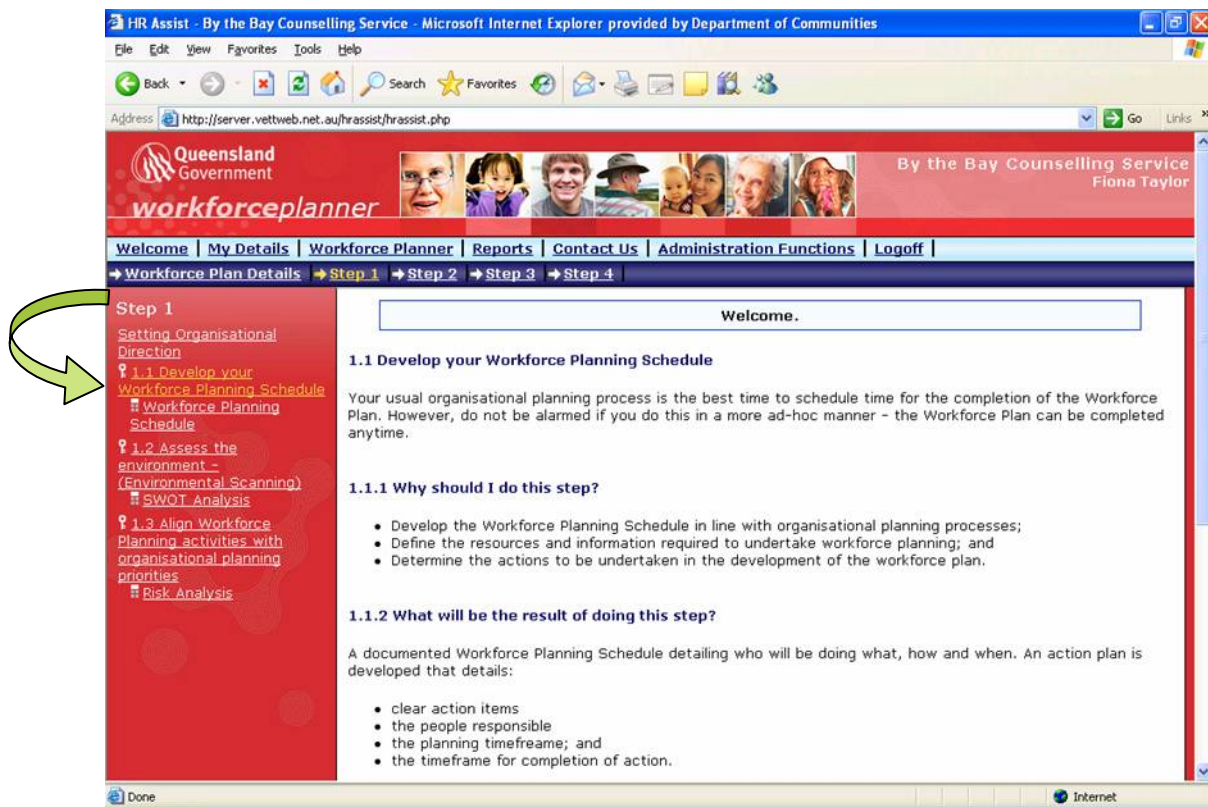
Selecting Step 1 from the second navigation toolbar leads you to the overview screen. This provides the same information contained within the *Workforce Planning Guidelines* document.



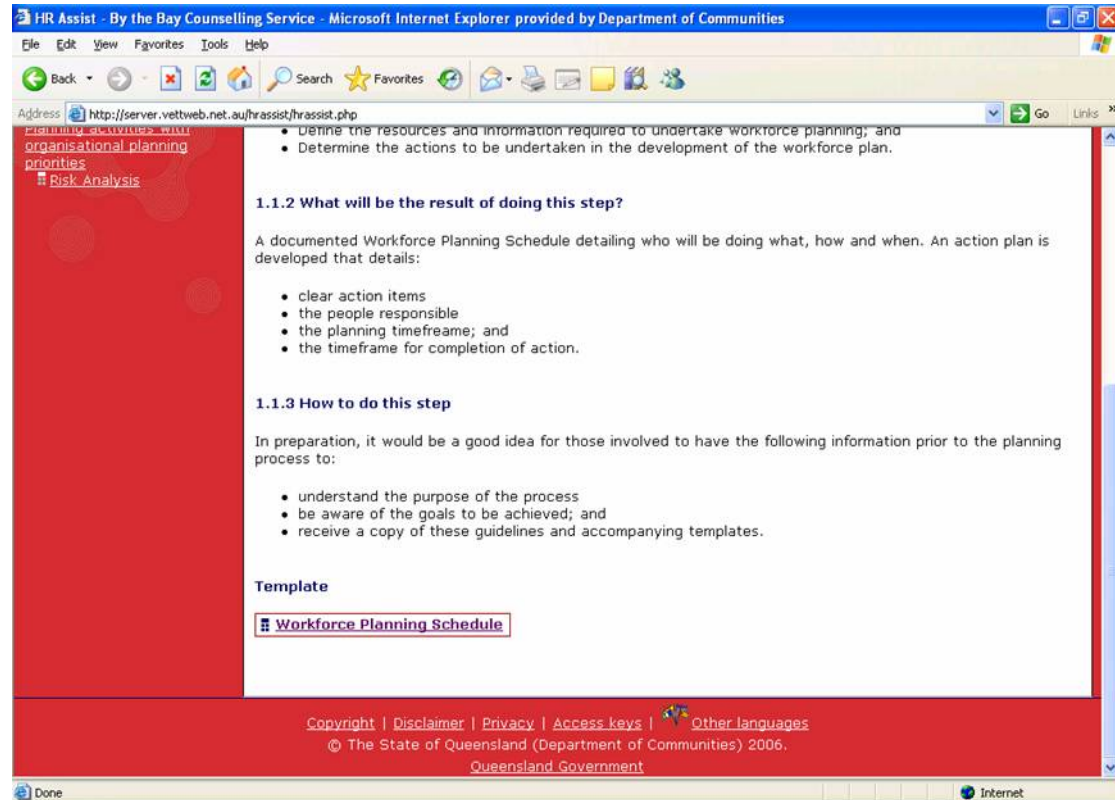
Setting organisational direction

4.2.1 Key activity 1.1: Develop your workforce planning schedule

This next screen provides the same information contained within the *Workforce Planning Guidelines* document and provides the context for activities within the setting organisational direction process.



Develop your workforce planning schedule — screen 1



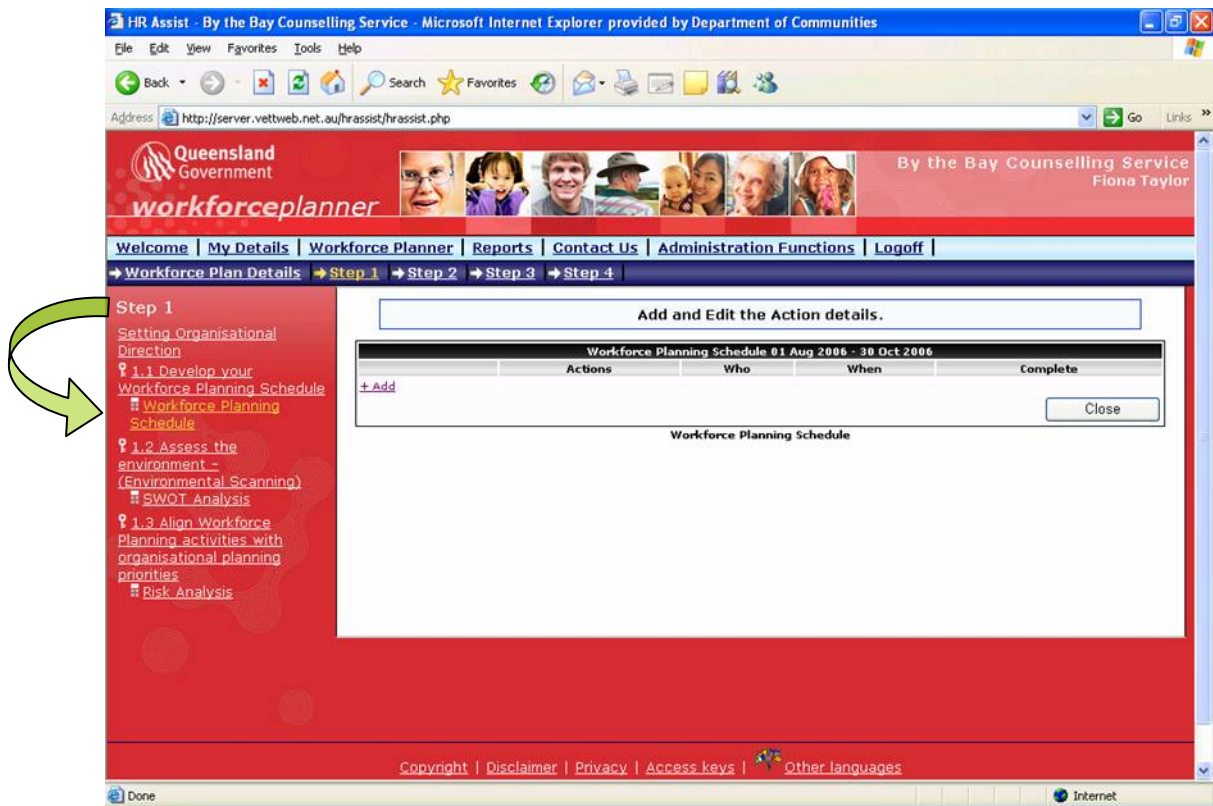
Develop your workforce planning schedule — screen 2

You will notice a link to the workforce planning schedule at the bottom of the screen. This is the same as the template provided in the *Workforce Planning Guidelines*. On selecting this

link, an entry screen will appear where you may enter details relevant to your organisation and your workforce plan.

4.2.1.1 Workforce planning schedule

The workforce planning schedule allows you to schedule tasks to groups and individuals so all parties are aware of their role in the process and the timeframe to complete their responsibilities.



By selecting the ‘+Add’ option, a screen is generated where you can enter activities.

An example of adding an action item follows:

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

File Edit View Favorites Tools Help

Address http://server.vettweb.net.au/hrassist/hrassist.php

Queensland Government
workforceplanner

By the Bay Counselling Service
Fiona Taylor

Welcome | My Details | Workforce Planner | Reports | Contact Us | Administration Functions | Logoff

Workforce Plan Details → Step 1 → Step 2 → Step 3 → Step 4

Step 1

Setting Organisational Direction

1.1 Develop your Workforce Planning Schedule

Workforce Planning Schedule

1.2 Assess the environment - (Environmental Scanning)

SWOT Analysis

1.3 Align Workforce Planning activities with organisational planning priorities

Risk Analysis

Update the Action details, and click the 'Update' button.

Workforce Planning Schedule 01 Aug 2006 - 30 Oct 2006

Actions

Coordinate an initial Planning Workshop with John Johnson (Bayside Mens Counselling Service) and our team to discuss this plan and the various other activities that need to occur for the transition.

Who

— Please select a User —

Jolene

When

28 Jul 2006

Complete

30 Oct 2006

* Denotes mandatory field

Update

Delete

Cancel

Workforce Planning Schedule

Workforce planning schedule — detail screen

The following screen is generated once an action item is saved. This allows additional action items to be entered. There is no limit to the number of items that may be added.

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

File Edit View Favorites Tools Help

Address http://server.vettweb.net.au/hrassist/hrassist.php

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Workforce Plan Details → Step 1 → Step 2 → Step 3 → Step 4

Step 1

Setting Organisational Direction

1.1 Develop your Workforce Planning Schedule

Workforce Planning Schedule

1.2 Assess the environment - (Environmental Scanning)

SWOT Analysis

1.3 Align Workforce Planning activities with organisational planning priorities

Risk Analysis

Actions successfully updated.

Workforce Planning Schedule 01 Aug 2006 - 30 Oct 2006

Actions	Who	When	Complete
Coordinate an initial Planning Workshop with John Johnson (Bayside Mens Counselling Service) and our team to discuss this plan and the various other activities that need to occur for the transition.	Jolene	28 Jul 2006	30 Oct 2006

Edit

+ Add

Close

Workforce Planning Schedule

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Workforce planning schedule — list screen

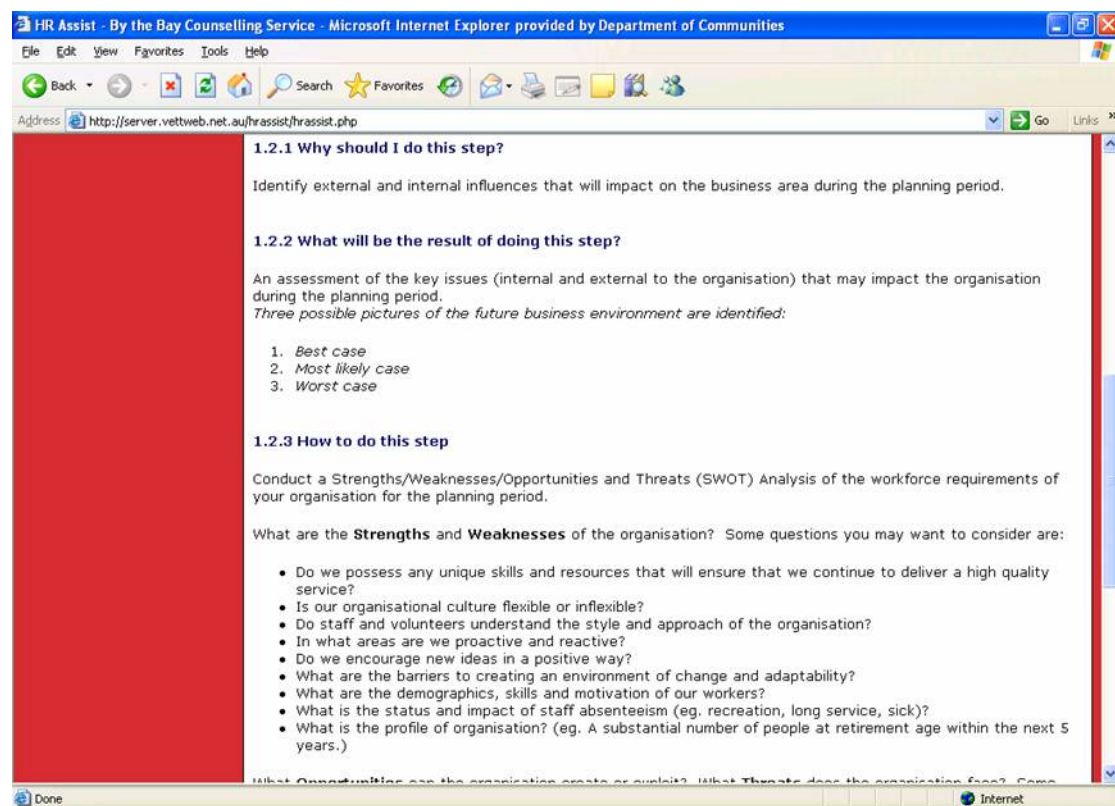
4.2.2 Key activity 1.2: Assess the environment (SWOT analysis)

This section determines the strengths, weaknesses, opportunities and threats associated with the environment in which your organisation operates and its effects on your workforce plan.



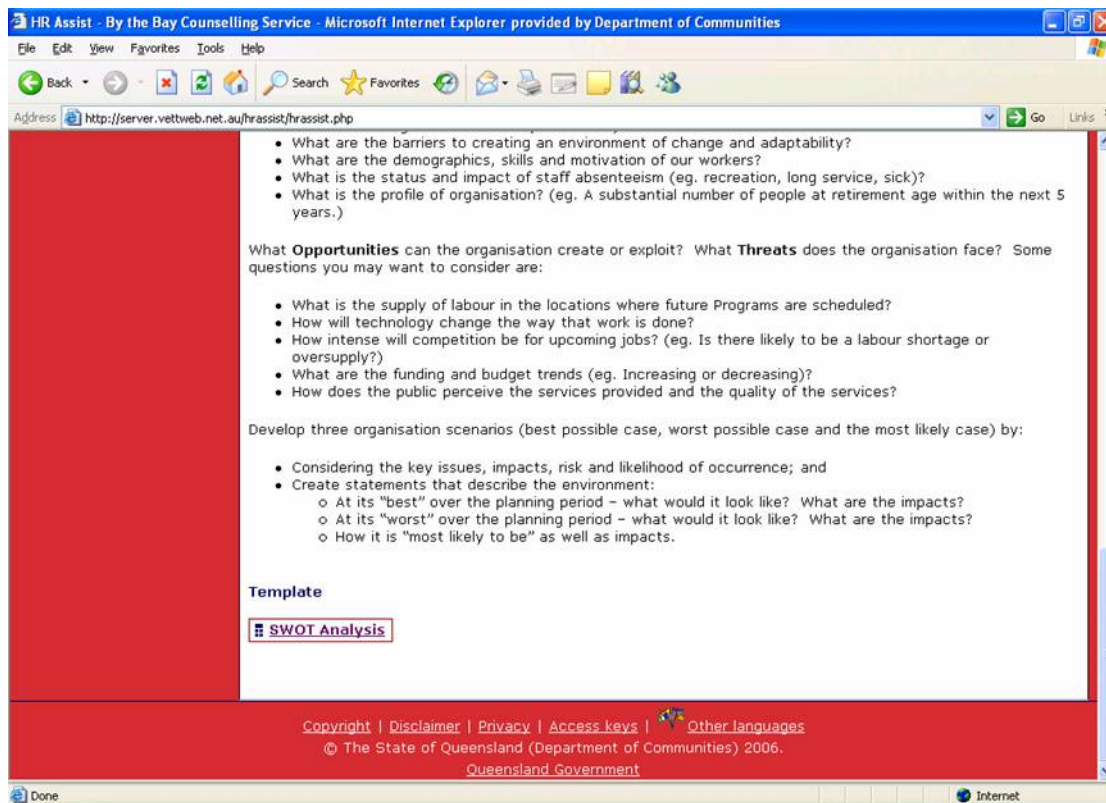
The screenshot shows a web browser window titled "HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities". The address bar shows "http://server.vettweb.net.au/hrassist/hrassist.php". The page has a red header with the Queensland Government logo and "workforceplanner" text. A navigation bar includes links like "Welcome", "My Details", "Workforce Planner", "Reports", "Contact Us", "Administration Functions", and "Logoff". Below this, a breadcrumb trail shows "Workforce Plan Details" followed by "Step 1", "Step 2", "Step 3", and "Step 4". A green arrow points to the "Step 1" menu on the left, which lists options like "Setting Organisational Direction", "1.1 Develop your Workforce Planning Schedule", "1.2 Assess the environment - (Environmental Scanning)", and "1.3 Align Workforce Planning activities with organisational planning priorities". The main content area is titled "Welcome." and "1.2 Assess the environment - (Environmental Scanning)". It contains text about undertaking research and collecting data on the external and internal organisational environment. It lists "External Influences" (Economic issues, Social issues, Environmental issues, Technological trends, Demographics) and "Internal Influences" (Organisational Planning Management Committee, Programs, Types of workers).

SWOT analysis — information screen 1



The screenshot shows the same web browser window, but the main content area is now titled "1.2.1 Why should I do this step?" and "1.2.2 What will be the result of doing this step?". It contains text about identifying external and internal influences that will impact on the business area during the planning period. It lists "Three possible pictures of the future business environment are identified:" (Best case, Most likely case, Worst case). It also includes "1.2.3 How to do this step" and text about conducting a Strengths/Weaknesses/Opportunities and Threats (SWOT) Analysis of the workforce requirements of your organisation for the planning period. It lists "What are the Strengths and Weaknesses of the organisation?" and provides a list of questions to consider (e.g., Do we possess any unique skills and resources that will ensure that we continue to deliver a high quality service? Is our organisational culture flexible or inflexible? Do staff and volunteers understand the style and approach of the organisation? In what areas are we proactive and reactive? Do we encourage new ideas in a positive way? What are the barriers to creating an environment of change and adaptability? What are the demographics, skills and motivation of our workers? What is the status and impact of staff absenteeism (eg. recreation, long service, sick)? What is the profile of organisation? (eg. A substantial number of people at retirement age within the next 5 years.)).

SWOT analysis — information screen 2

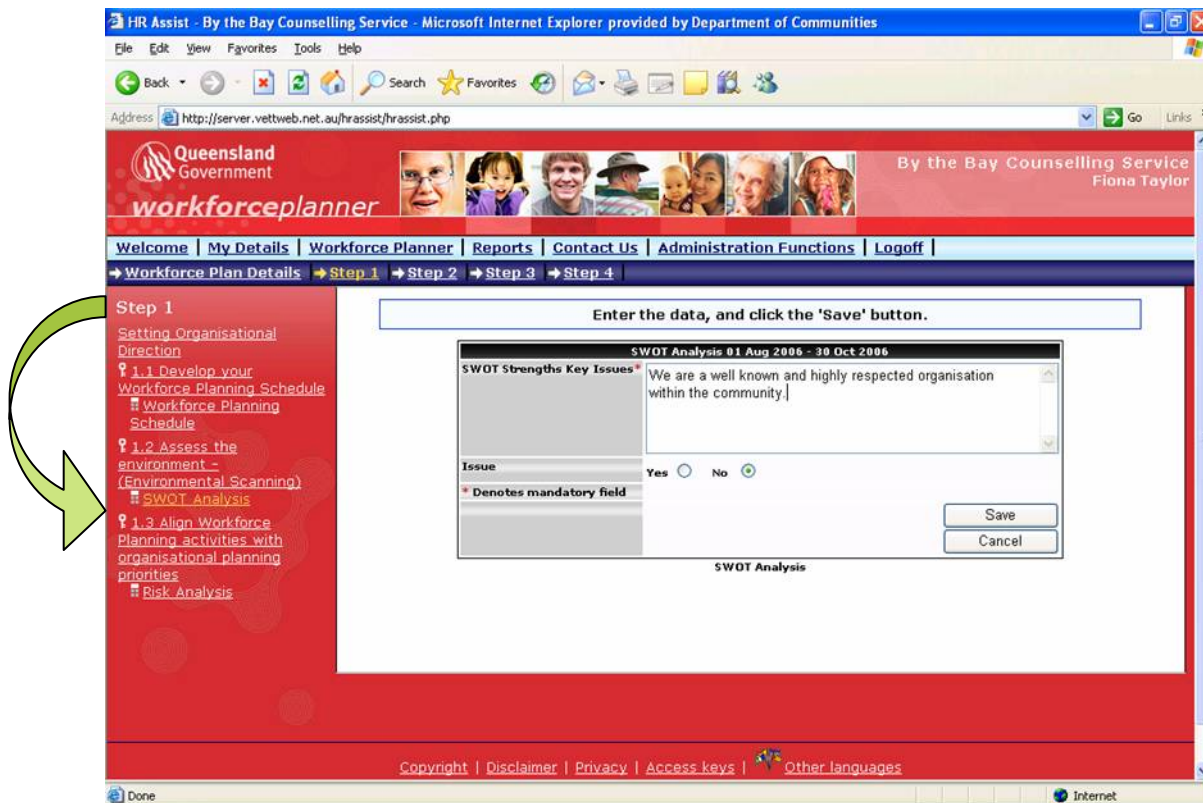


SWOT analysis — information screen 3

As noted previously, the first screen for each of the key activities overviews the activity topic. The same information is contained within the *Workforce Planning Guidelines — A tool kit for Non-Government Organisations to plan future workforce needs* document.

Adding SWOT components

Select **+Add** for any SWOT component. See the By the Bay Counselling Service example in the following screen.



SWOT analysis detail screen

Once the strength has been added and the save button selected, the following screen is generated. Continue to add strengths, weaknesses, opportunities and threats in the same fashion.

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

File Edit View Favorites Tools Help

Address http://server.vettweb.net.au/hrassist/hrassist.php

Queensland Government workforceplanner By the Bay Counselling Service Fiona Taylor

Welcome | My Details | Workforce Planner | Reports | Contact Us | Administration Functions | Logoff

Workforce Plan Details > Step 1 > Step 2 > Step 3 > Step 4

Step 1

Setting Organisational Direction

1.1 Develop your Workforce Planning Schedule

1.2 Assess the environment - (Environmental Scanning)

1.3 Align Workforce Planning activities with organisational planning priorities

Key Issue successfully inserted.

SWOT Analysis 01 Aug 2006 - 30 Oct 2006

Strengths	Issue	Opportunities	Issue
Edit We are a well known and highly respected organisation within the community. + Add	No	+ Add	
+ Add	+ Add	+ Add	

Risk Analysis of Key Issues

Close

SWOT Analysis

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SWOT analysis list screen

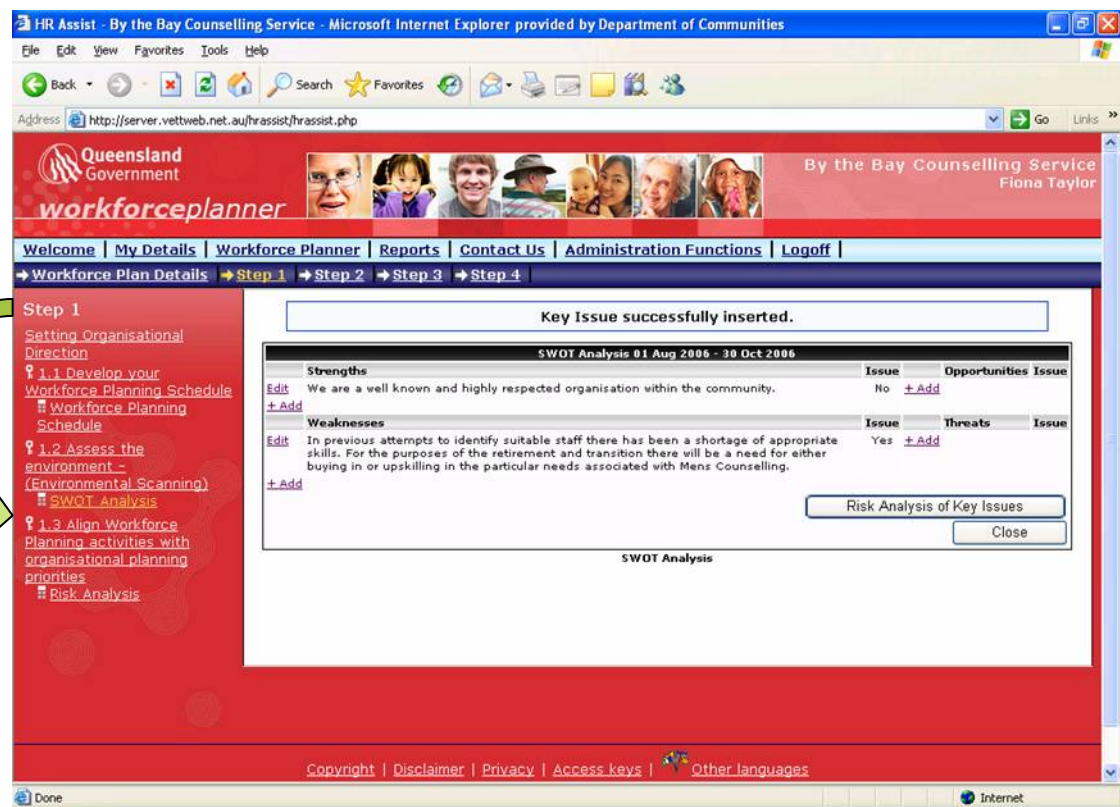
4.2.3 Issues and risk analysis

The SWOT analysis may raise issues of concern. Issues can be indicated against the appropriate SWOT component and a risk mitigation strategy developed to address issues.

The screenshot shows the 'HR Assist - By the Bay Counselling Service' web application in Microsoft Internet Explorer. The browser address bar shows 'http://server.vettweb.net.au/hrassist/hrassist.php'. The page header includes the Queensland Government logo, 'workforceplanner', and a navigation bar with links: 'Welcome', 'My Details', 'Workforce Planner', 'Reports', 'Contact Us', 'Administration Functions', and 'Logoff'. Below the navigation bar, a breadcrumb trail shows 'Workforce Plan Details' followed by 'Step 1', 'Step 2', 'Step 3', and 'Step 4'. A green arrow points from the 'Step 1' link in the breadcrumb to the 'Step 1' section on the left sidebar. The sidebar lists the following steps: 'Step 1: Setting Organisational Direction' (with sub-steps 1.1, 1.2, and 1.3), 'Step 2: Develop your Workforce Planning Schedule', 'Step 3: Assess the environment - (Environmental Scanning)', and 'Step 4: Align Workforce Planning activities with organisational planning priorities' (with sub-steps 'SWOT Analysis' and 'Risk Analysis'). The main content area is titled 'Enter the data, and click the 'Save' button.' and contains a form titled 'SWOT Analysis 01 Aug 2006 - 30 Oct 2006'. The form has a table with two columns: 'SWOT Weaknesses Key Issues' and 'Issue'. The first row contains the text 'In previous attempts to identify suitable staff there has been a shortage of appropriate skills. For the purposes of the retirement and transition there will be a need for either buying in or upskilling in the particular needs associated with Mens Counselling.' and a 'Yes' radio button. Below the table is a 'Save' button and a 'Cancel' button. The footer of the page includes links for 'Copyright', 'Disclaimer', 'Privacy', 'Access keys', and 'Other languages'.

SWOT analysis

See the 'weakness' example below to see how to identify issues and analyse and report associated risks.



SWOT analysis — detail Screen

4.2.3.1 Risk analysis of key issues

Once identified, risks can be further analysed and strategies can be developed to solve or mitigate them. The following example relates to an identified skills weakness within the By the Bay Counselling Service's men's counselling area and how this can be addressed.

Selecting the 'risk analysis of key issues' button will generate the following screen where you may enter a brief description of the issue, note its potential effect and the likelihood of the issue occurring.

The tool identifies an issue's risk rating by combining its potential impact and likelihood of occurrence. This approach ensures a consistent approach to identifying and categorising issues. Tables 1, 2 and 3 make up the total risk matrix as follows:

Table 1: Measures of potential impact

Description	Definition
Insignificant	No impact: - no financial loss - no significant adverse comment in media. Resolved by day-to-day management, or - insignificant loss of capability to continue a program/s. Very little disruption to core business.
Minor	No slowing of business, only a small distraction: - low financial loss - Adverse comment in local media only, limited damage to reputation, or - minor loss of capability to continue a program/s, minor disruption to core business.
Moderate	Will require action but business/project is still largely on track: - high financial loss - an adverse article reported in the daily media, questions in Parliament, embarrassment for departmental management, or - some loss of capability to continue a program/s, moderate disruption to core business.
Major	Will cause disruption and either require more resources, more time or reduce quality: - major financial loss - adverse articles reported in media on successive days, embarrassment to Director-General and Minister - issue raised in Parliament with Minister involved in public damage control, or - loss of capability to continue a program/s, major disruption to core business.
Catastrophic	Will stop project/activity/business. Will not achieve objectives and requires immediate attention: - huge financial loss - public scandal in the media leading to extensive damage to reputation, potential Parliamentary inquiry, or - severe loss of capability to continue a program/s, severe disruption to core business.

Table 2: Measures of likelihood

Description	Definition
Almost certain	The event is expected to occur in most circumstances.
Likely	The event will probably occur in most circumstances.
Possible	The event might occur at some time.
Unlikely	The event could occur at some time.
Rare	The event may occur only in exceptional circumstances.

Table 3: Risk rating

Likelihood	Impact				
	Insignificant	Minor	Moderate	Major	Catastrophic
Almost certain	Low	Moderate	High	Extreme	Extreme
Likely	Low	Moderate	High	Extreme	Extreme
Possible	Low	Low	Moderate	High	Extreme
Unlikely	Low	Low	Moderate	High	High
Rare	Low	Low	Moderate	Moderate	Moderate

Risk consequence

Extreme:	Requires immediate action as it could be devastating to the organisation.
High:	Requires action as it has the potential to be damaging to the organisation.
Moderate:	Allocate specific responsibility and implement monitoring or response procedures.
Low:	Treat with routine procedures.

As you will notice, the risk matrix is also duplicated within the Workforce Planner Tool.

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

Address: http://server.vettweb.net.au/hrassist/hrassist.php

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Workforce Plan Details → Step 1 → Step 2 → Step 3 → Step 4

Step 1
Setting Organisational Direction
1.1 Develop your Workforce Planning Schedule
Workforce Planning Schedule
1.2 Assess the environment - (Environmental Scanning)
SWOT Analysis
1.3 Align Workforce Planning activities with organisational planning priorities
Risk Analysis

Update the details, and click the 'Update' button.

Risk Analysis 01 Aug 2006 - 30 Oct 2006

Key Issues*
Skill Shortage for human services industry particularly in Bay location.

Potential Impact*
Moderate

Likelihood of Occurring*
Likely

Risk Rating*
High

* Denotes mandatory field

Update
Delete
Cancel

Risk Analysis

Description	Definition
Insignificant	No impact - No financial loss; - No significant adverse comment in media - resolved by day to day management; or

Done Internet

Risk analysis — detail screen and risk matrix

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

Address: http://server.vettweb.net.au/hrassist/hrassist.php

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Workforce Plan Details → Step 1 → Step 2 → Step 3 → Step 4

Step 1
Setting Organisational Direction
1.1 Develop your Workforce Planning Schedule
Workforce Planning Schedule
1.2 Assess the environment - (Environmental Scanning)
SWOT Analysis
1.3 Align Workforce Planning activities with organisational planning priorities
Risk Analysis

Measures of Potential Impact

Description	Definition
Minor	No slowing of business, only a small distraction - Low financial loss; - Adverse comment in local media only, limited damage to reputation; or - Minor loss of capability to continue a program/s; minor disruption to core business.
Moderate	Will require action but business/project is still largely on track - High financial loss; - An adverse article reported in the daily media; questions in Parliament, embarrassment for Departmental management; or - Some loss of capability to continue a program/s; moderate disruption to core business.
Major	Will cause disruption and will either require more resources; more time or reduce quality - Major financial loss; - Adverse articles reported in media on successive days; embarrassment to DG and Minister; - Issue raised in Parliament, with Minister involved in public damage control; or - Loss of capability to continue a program/s; major disruption to core business.
Catastrophic	Will stop project/activity/business - will not achieve objectives and requires immediate attention - Huge financial loss; - Public scandal in the press leading to extensive damage to reputation - potential Parliamentary inquiry; or - Severe loss of capability to continue a program/s; severe disruption to core business.

Measures of Likelihood

Description	Definition
Almost certain	The event is expected to occur in most circumstances
Likely	The event will probably occur in most circumstances
Possible	The event might occur at some time
Unlikely	The event could occur at some time
Rare	The event may occur only in exceptional circumstances

Done Internet

Risk analysis — detail Screen and risk matrix

The risk analysis matrix identifies and categorises key issues in a consistent manner.

HR Assist - By the Bay Counselling Service - Microsoft Internet Explorer provided by Department of Communities

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Go Links

Address http://server.vettweb.net.au/hrassist/hrassist.php

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Welcome | My Details | Workforce Planner | Reports | Contact Us | Administration Functions | Logoff

Workforce Plan Details → Step 1 → Step 2 → Step 3 → Step 4

Step 1

Setting Organisational Direction

1.1 Develop your Workforce Planning Schedule

Workforce Planning Schedule

1.2 Assess the environment - (Environmental Scanning)

SWOT Analysis

1.3 Align Workforce Planning activities with organisational planning priorities

Risk Analysis

Risk Analysis of Key Issues successfully updated.

SWOT Analysis 01 Aug 2006 - 30 Oct 2006

Strengths	Issue Opportunities	Issue
Weaknesses	Issue Threats	Issue

In previous attempts to identify suitable staff there has been a shortage of appropriate skills. For the purposes of the retirement and transition there will be a need for either buying in or upskilling in the particular needs associated with Mens Counselling.

SWOT Analysis

Risk Analysis 01 Aug 2006 - 30 Oct 2006

Key Issues	Potential Impact	Likelihood of Occurring	Risk Rating
Edit + Add	Skill Shortage for human services industry particularly in Bay location.	Moderate	Likely High

Risk Analysis

Close

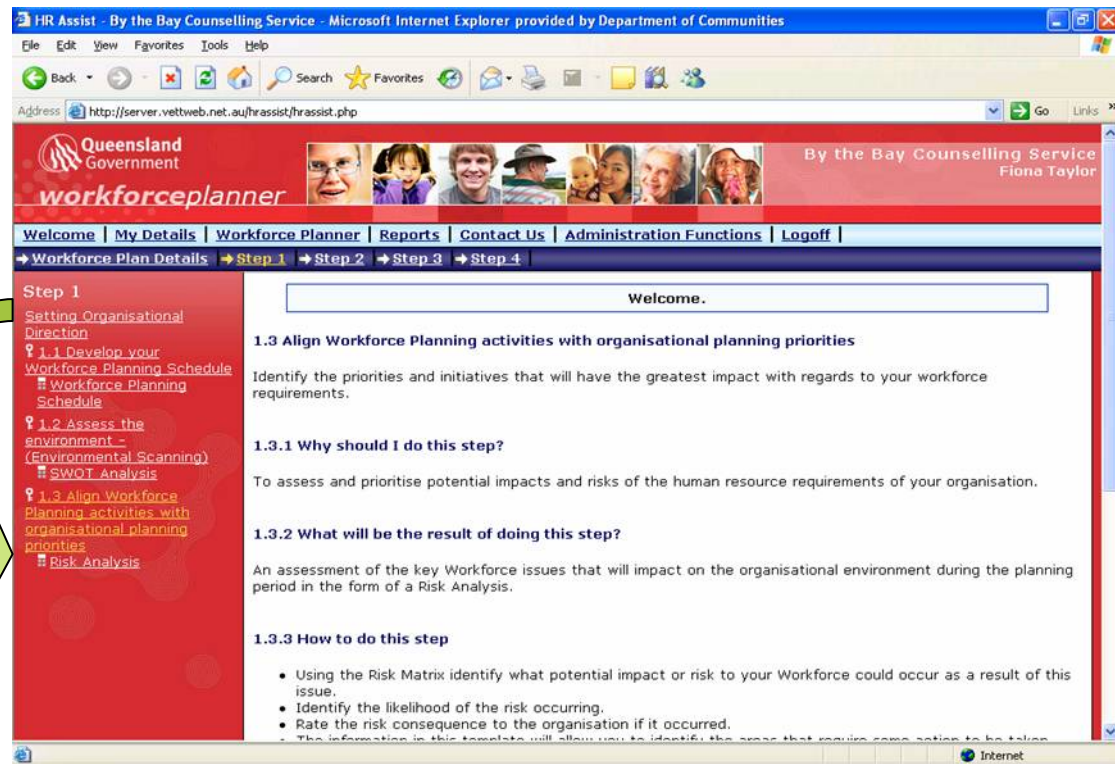
Copyright | Disclaimer | Privacy | Access keys | Other languages

Done Internet

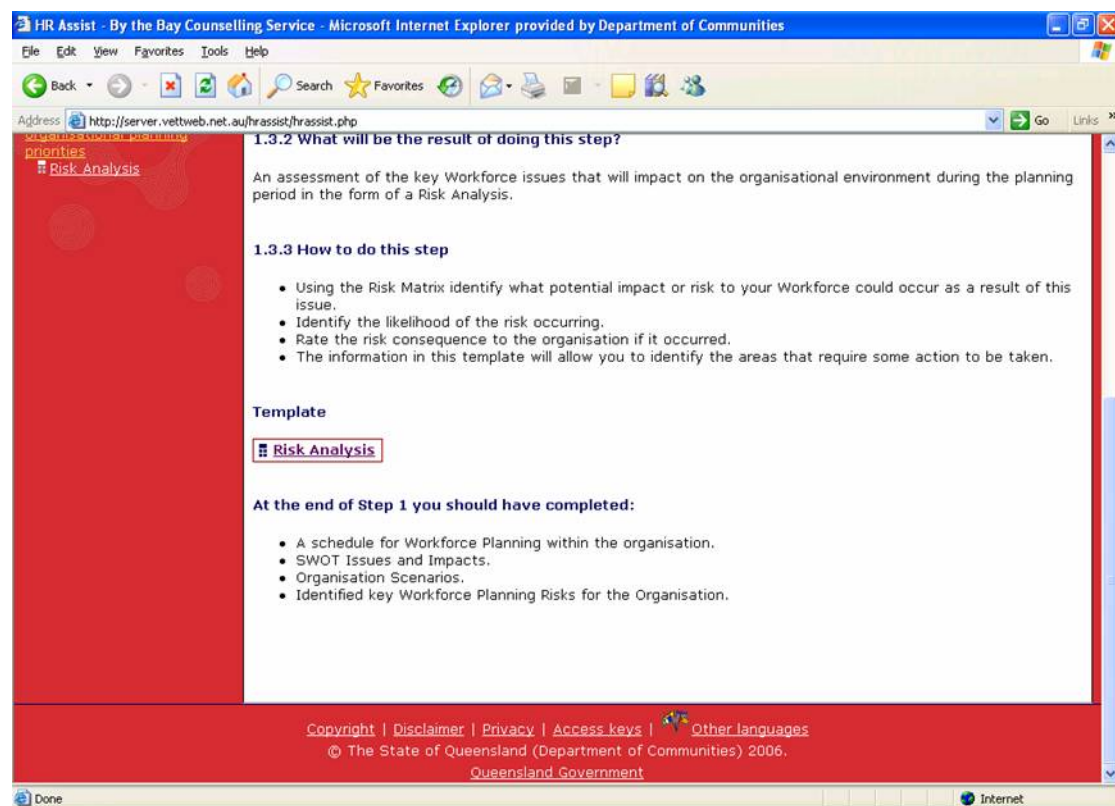
Risk analysis — list screen

4.2.4 Key activity 1.3 — align workforce planning activities with organisational planning priorities

The final step in the 'setting organisational direction' stage is to align workforce planning activities with organisational priorities. To do this, the risk analysis must have been completed.



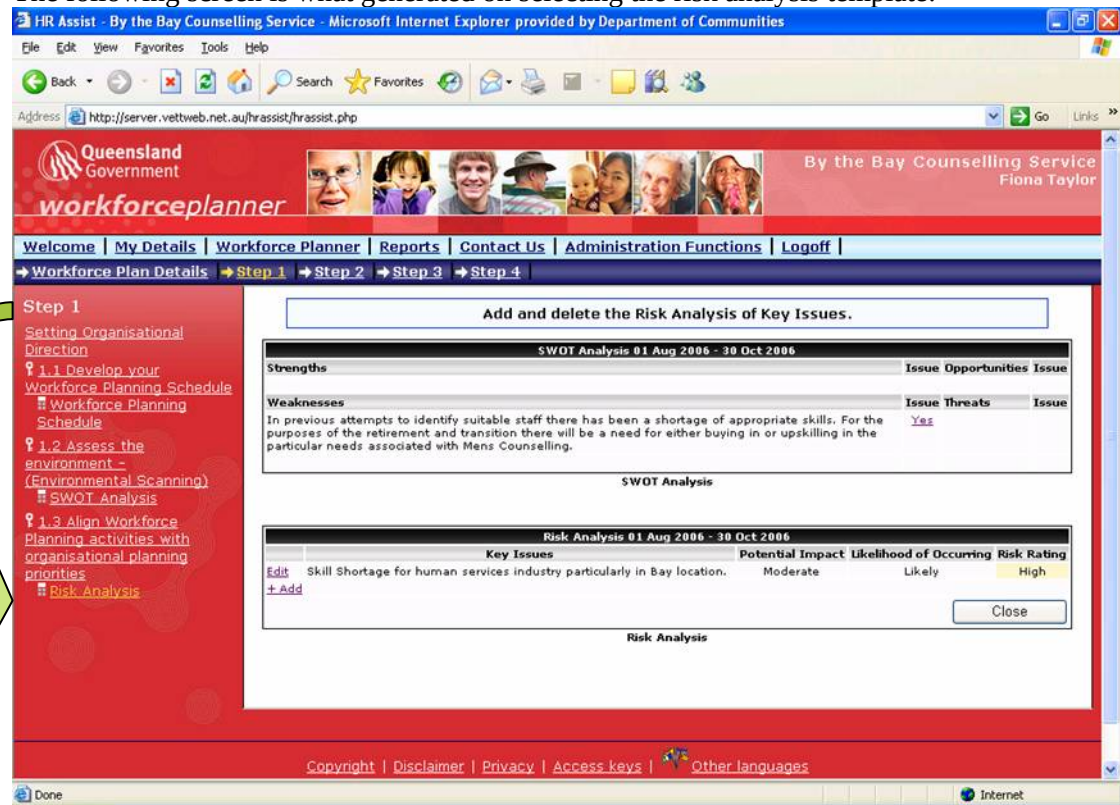
Risk analysis — information screen 1



Risk analysis — information screen 2

This is the same screen accessed when developing a SWOT analysis. However, should a SWOT analysis not be required or entered, the risk analysis screen and activities screen can be accessed directly.

The following screen is what generated on selecting the risk analysis template:



Risk analysis — screen 1

If there are additional risks not specifically linked to the SWOT, they may also be added here.

This is the final step in the setting organisational direction phase of the workforce planning process. By completing these steps, you will have identified issues that may need to be addressed to support your workforce plan. The following tools will also have been completed:

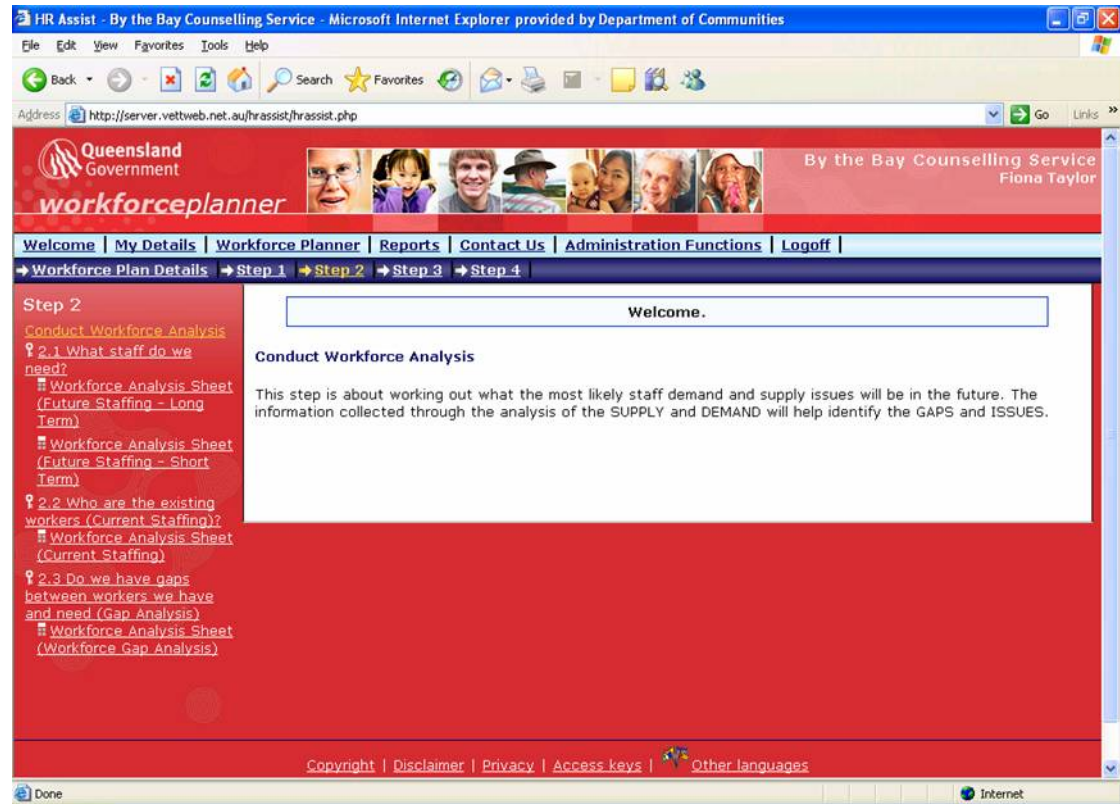
- workforce planning schedule
- SWOT analysis
- key issues and impacts, and
- risk analysis.

The next component in the Workforce Planning Process is to conduct workforce analysis.

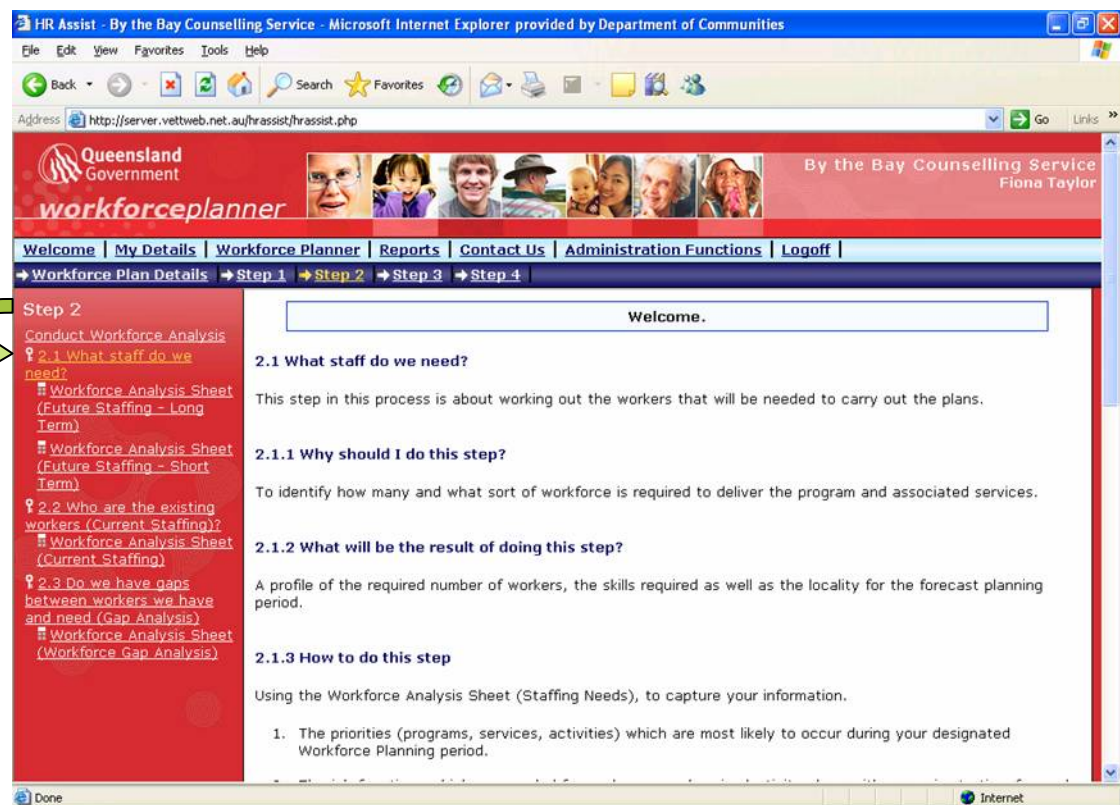
5 Step 2 — conduct workforce analysis

Select 'step 2' from the second toolbar to access the second step in the workforce planning process — conduct workforce analysis. The primary purpose of this step is to identify labour supply and demand, and identify gaps and issues associated with labour and ways to rectify these issues.

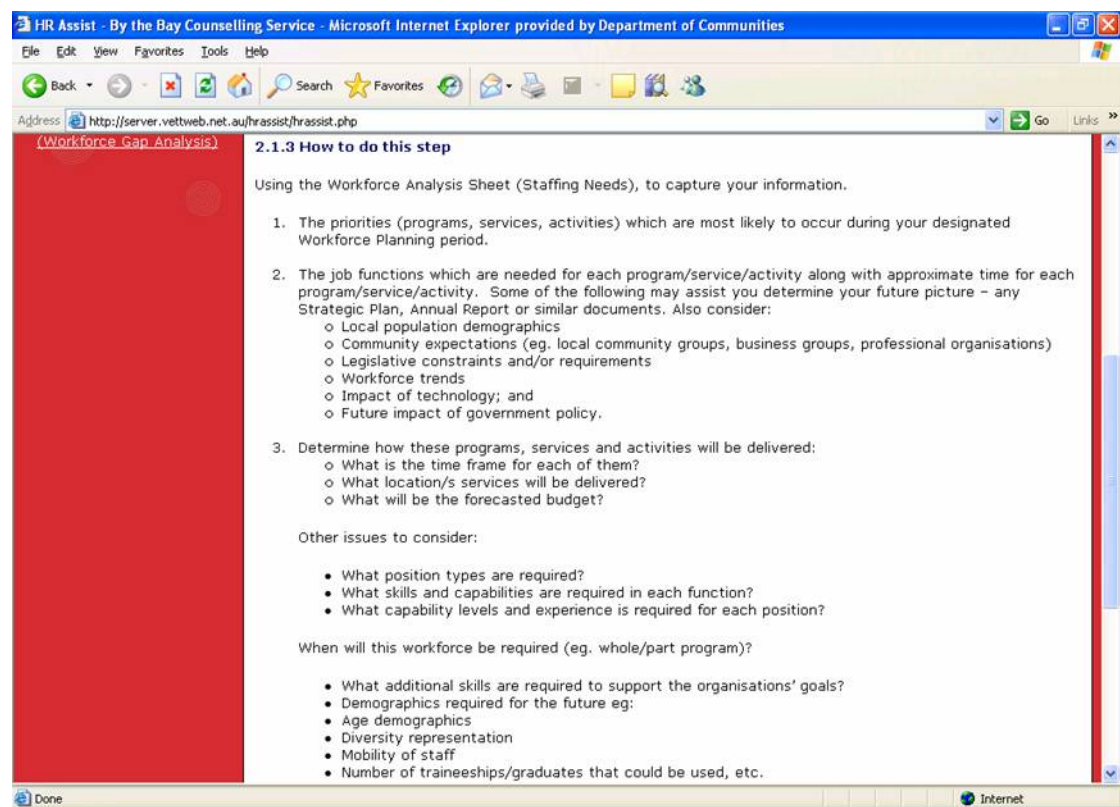
The following screen is an overview of Step 2:



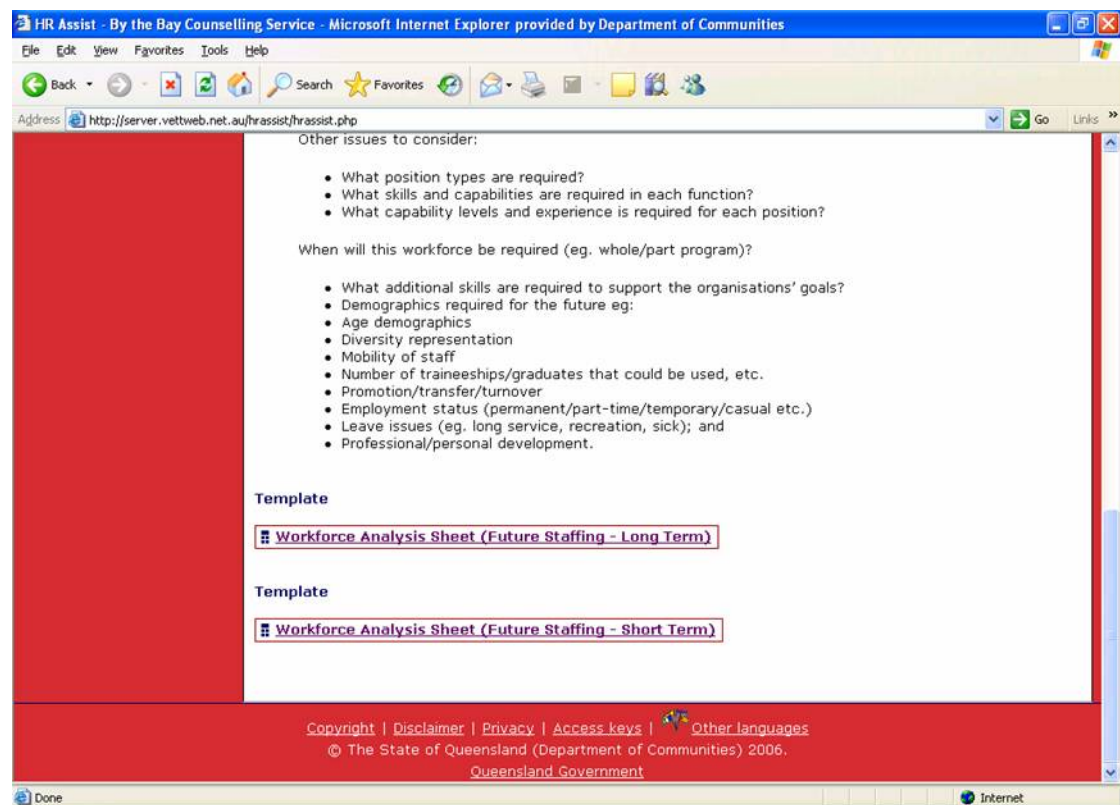
Conduct workforce analysis — screen 1



Future staffing — information screen 1



Future staffing — information screen 2



Future staffing — information screen 3

5.1 Key activity 2.1 — staffing requirements

Assessing staff requirements is fundamental to the workforce planning process. The Workforce Planner Tool provides two templates to analyse labour needs. Where your plan is designed to cover more than one year, you should use the long-term template, otherwise the short-term version is appropriate.

5.1.1 Example — workforce analysis sheet (long term)

The long-term version of the staffing requirements template is better used for plans of greater than one year, with potential funding for at least 12 months. (While the scenario given in the user guide is for a project of just three months, the data has been used here to complete an example workforce analysis sheet.)

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Workforce Plan Details Step 1 Step 2 Step 3 Step 4

Step 2

Conduct Workforce Analysis

2.1 What staff do we need?

Workforce Analysis Sheet (Future Staffing - Long Term)

Workforce Analysis Sheet (Future Staffing - Short Term)

2.2 Who are the existing workers (Current Staffing)?

Workforce Analysis Sheet (Current Staffing)

2.3 Do we have gaps between workers we have and need (Gap Analysis)?

Workforce Analysis Sheet (Workforce Gap Analysis)

Enter the Long Term Staffing Requirements details, and click the 'Save' button.

WORKFORCE ANALYSIS SHEET - Long Term Future Staffing Requirements 01 Aug 2006 - 30 Oct 2006

Program*	Retirement Project
Position Type	Project Manager
Salary Level	
# of Full Time Staff (FTE)	0.5
Qualifications/Skills Required	Project Planning; Implementation; and Evaluation. Issue Resolution - Negotiation, Communication and Presentation skills.
Timeframe	3 months
Location	DEFAULT LOCATION
Budget/Forecast Revenue	
Years	☒ 1 ☐ 2 ☐ 3 ☐ 5

* Denotes mandatory field

Save Cancel

WORKFORCE ANALYSIS SHEET - Long Term Future Staffing Requirements

Future staffing: long-term detail — screen 1

A summary of the data entered follows. To add staffing requirements, select the **+Add** option to access the detail entry screen.

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Step 2

Conduct Workforce Analysis

2.1 What staff do we need?

Workforce Analysis Sheet (Future Staffing - Long Term)

Workforce Analysis Sheet (Future Staffing - Short Term)

2.2 Who are the existing workers (Current Staffing)?

Workforce Analysis Sheet (Current Staffing)

2.3 Do we have gaps between workers we have and need (Gap Analysis)?

Workforce Analysis Sheet (Workforce Gap Analysis)

Long Term Staffing Requirements successfully inserted.

WORKFORCE ANALYSIS SHEET - Long Term Future Staffing Requirements 01 Aug 2006 - 30 Oct 2006

	Program	Position Type	Salary Level	# of Full Time Staff (FTE)	Qualifications/Skills Required	Timeframe	Location	Budget/Forecast Revenue	Years
									1 2 3 5
Edit	Retirement Project	Project Manager		0.50	Project Planning; Implementation; and Evaluation. Issue Resolution - Negotiation, Communication and Presentation skills.	3 months	DEFAULT LOCATION		1
+ Add									

Close

WORKFORCE ANALYSIS SHEET - Long Term Future Staffing Requirements

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Future staffing: long-term list — screen 1

5.1.2 Example — workforce analysis sheet (short term)

The short-term version of the staffing requirements template suits the scenario in the user guide where a project manager is required for three months to manage the service's retirement transition project.

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→ Workforce Plan Details → Step 1 → **Step 2** → Step 3 → Step 4

Step 2
Conduct Workforce Analysis
2.1 What staff do we need?
Workforce Analysis Sheet (Future Staffing - Long Term)
Workforce Analysis Sheet (Future Staffing - Short Term)
2.2 Who are the existing workers (Current Staffing)?
Workforce Analysis Sheet (Current Staffing)
2.3 Do we have gaps between workers we have and need (Gap Analysis)
Workforce Analysis Sheet (Workforce Gap Analysis)

Enter the Short Term Staffing Requirements details, and click the 'Save' button.

WORKFORCE ANALYSIS SHEET - Short Term Future Staffing Requirements 01 Aug 2006 - 30 Oct 2006

Program*	Retirement Project
Position Type	Project Manager
Salary Level	TBA
# of Full Time Staff (FTE)	0.5
Qualifications / Skills Required	Project Planning; Implementation and Evaluation; Negotiation, Communication and Presentation skills
Timeframe	3 months
Location	DEFAULT LOCATION
Budget/Forecast Revenue	
Months	Jul ☐ Aug ☒ Sep ☒ Oct ☒

Future staffing: short-term detail — screen 1

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→ Workforce Plan Details → Step 1 → **Step 2** → Step 3 → Step 4

Step 2
Conduct Workforce Analysis
2.1 What staff do we need?
Workforce Analysis Sheet (Future Staffing - Long Term)
Workforce Analysis Sheet (Future Staffing - Short Term)
2.2 Who are the existing workers (Current Staffing)?
Workforce Analysis Sheet (Current Staffing)
2.3 Do we have gaps between workers we have and need (Gap Analysis)
Workforce Analysis Sheet (Workforce Gap Analysis)

Enter the Short Term Staffing Requirements details, and click the 'Save' button.

WORKFORCE ANALYSIS SHEET - Short Term Future Staffing Requirements 01 Aug 2006 - 30 Oct 2006

Timeframe	3 months
Location	DEFAULT LOCATION
Budget/Forecast Revenue	
Months	Jul ☐ Aug ☒ Sep ☒ Oct ☒ Nov ☐ Dec ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐

* Denotes mandatory field

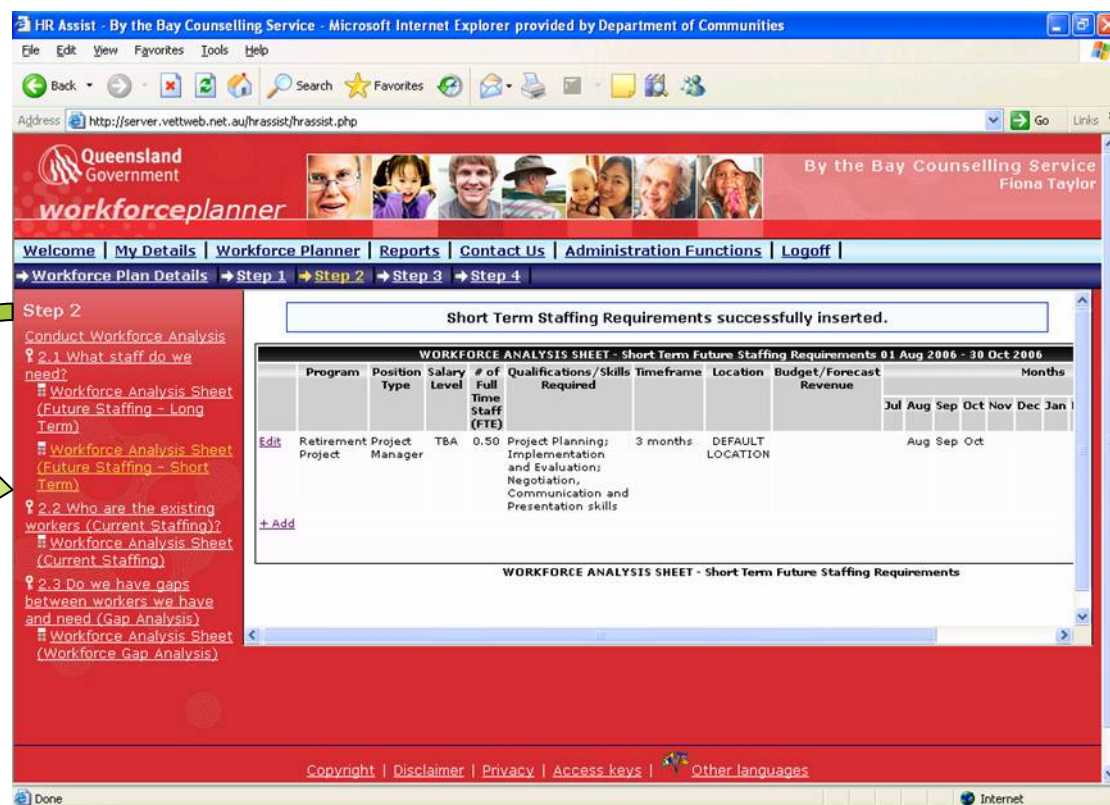
Save
Cancel

WORKFORCE ANALYSIS SHEET - Short Term Future Staffing Requirements

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Future Staffing: short-term detail — screen 2

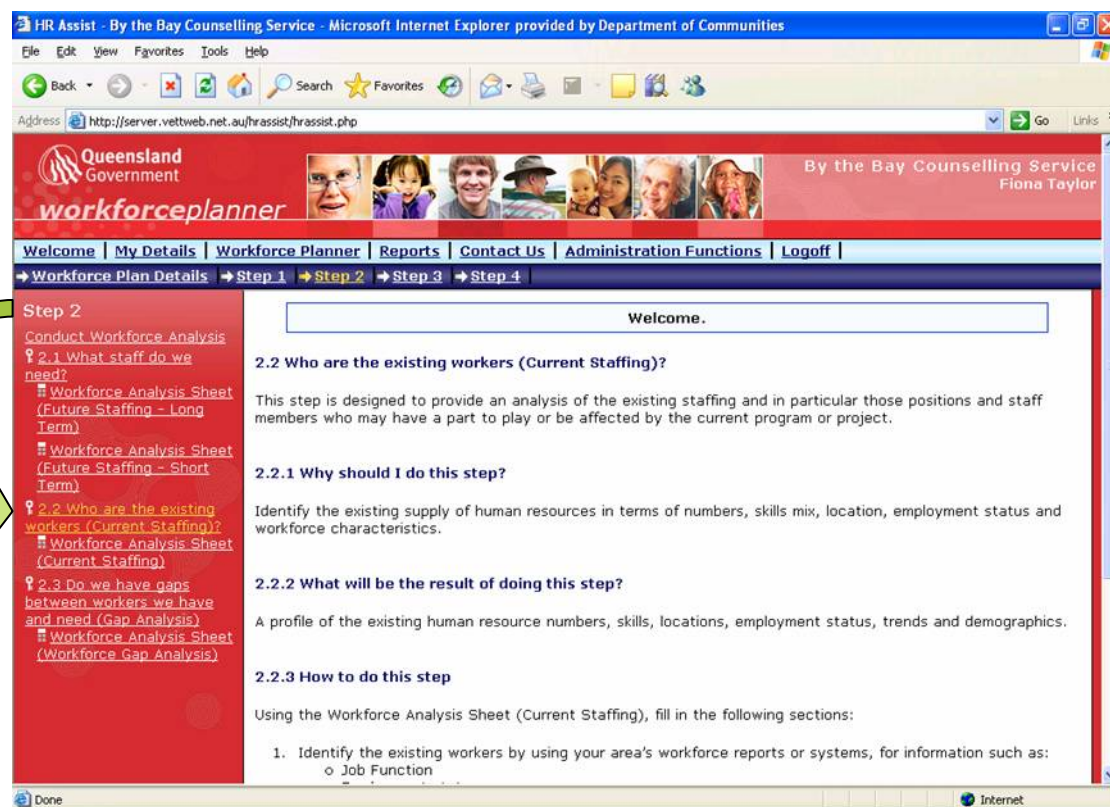
The following screen summarises data gathered from one entry in the workforce analysis sheet (short term).



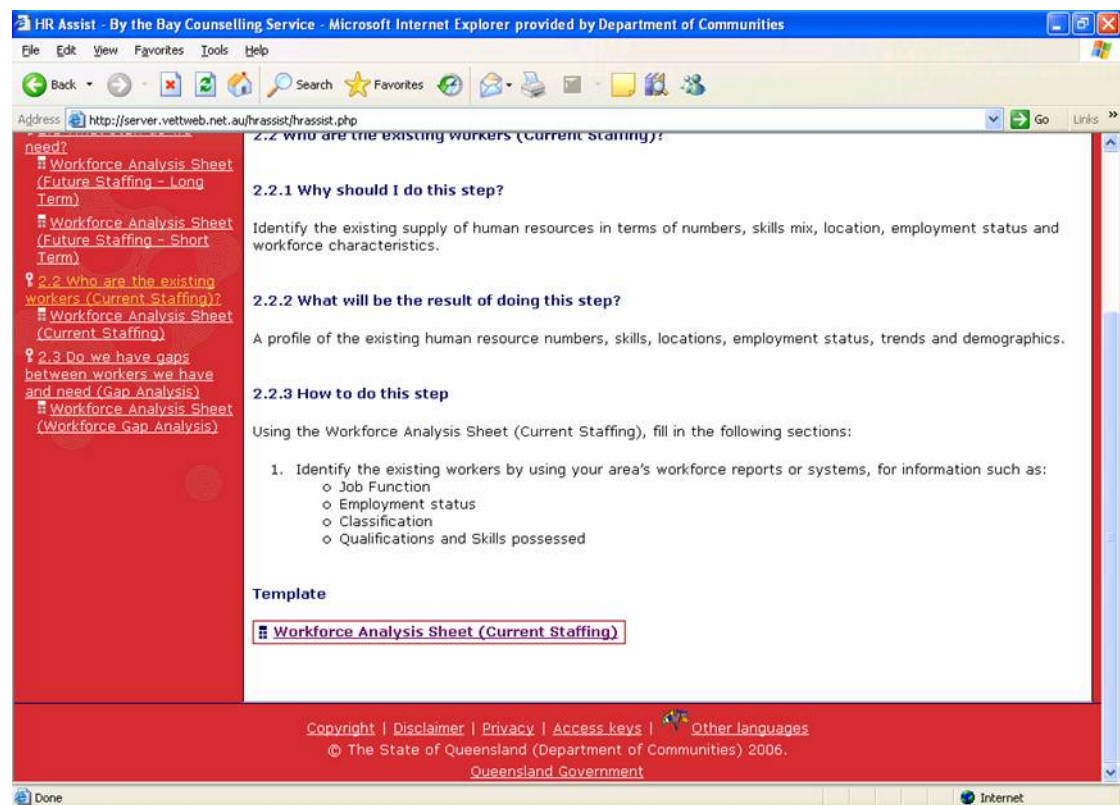
Future staffing — short-term list screen

5.2 Key activity 2.2 — Current staffing

This activity documents your organisation's or organisational unit's current workforce. Large organisations do not need to list all staff. They should just identify staff affected by or potentially affected by the workforce plan.



Current staff information — screen 1



Current staff information — screen 2

5.2.1 Workforce analysis sheet — current staff

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Step 2
Conduct Workforce Analysis
2.1 What staff do we need?
Workforce Analysis Sheet (Future Staffing - Long Term)
Workforce Analysis Sheet (Future Staffing - Short Term)
2.2 Who are the existing workers (Current Staffing)?
Workforce Analysis Sheet (Current Staffing)
2.3 Do we have gaps between workers we have and need (Gap Analysis)
Workforce Analysis Sheet (Workforce Gap Analysis)

Enter the Current Staffing details, and click the 'Save' button.

WORKFORCE ANALYSIS SHEET - Current Staffing 01 Aug 2006 - 30 Oct 2006

Position Type*	Director
Full time	☒
Part time	☐
Casual	☐
Salary Level	N/A
# of Full Time Staff (FTE)	1
Qualification/Skill Required	Overall management of the transition and to provide the strategic direction for the project.

* Denotes mandatory field

Save
Cancel

WORKFORCE ANALYSIS SHEET - Current Staffing

Workforce analysis — current staff detail screen

Additional resources can be entered in the same manner as above and result in the following summary screen.

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Workforce Plan Details → Step 1 → **Step 2** → Step 3 → Step 4

Step 2
Conduct Workforce Analysis
2.1 What staff do we need?
Workforce Analysis Sheet (Future Staffing - Long Term)
Workforce Analysis Sheet (Future Staffing - Short Term)
2.2 Who are the existing workers (Current Staffing)?
Workforce Analysis Sheet (Current Staffing)
2.3 Do we have gaps between workers we have and need (Gap Analysis)
Workforce Analysis Sheet (Workforce Gap Analysis)

Current Staffing successfully inserted.

WORKFORCE ANALYSIS SHEET - Current Staffing 01 Aug 2006 - 30 Oct 2006

	Position Type	Full time	Part time	Casual	Salary Level	# of Full Time Staff (FTE)	Qualification/Skill Required
Edit	Director	Full time			N/A	1.00	Overall management of the transition and to provide the strategic direction for the project.
Edit	Administrative Support		Part time		\$35k	0.25	To assist the Director and Project Manager with the coordination and administration aspects of the project.
Edit	Project Officer	Full time			\$50k	1.00	Project Support and Project Coordination. Work closely with the Project Manager to ensure that the milestones are being met, escalate issues and mitigate risks as this project has a defined timeframe.
+ Add							

Close

WORKFORCE ANALYSIS SHEET - Current Staffing

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Workforce analysis — current staff list screen

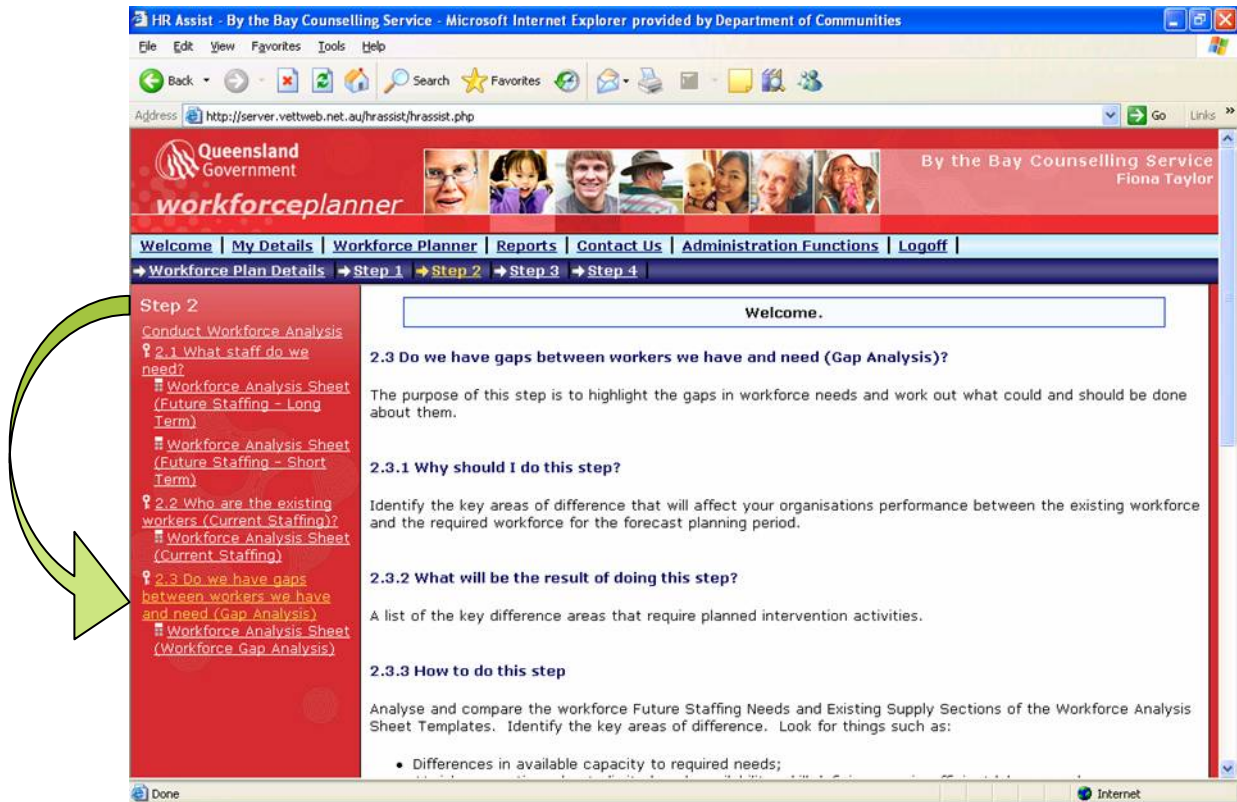
You can quickly create an overview of the project or program you are planning from a resource perspective and build a report on which decisions may be made or business cases built.

5.3 Key activity 2.3 — gap analysis

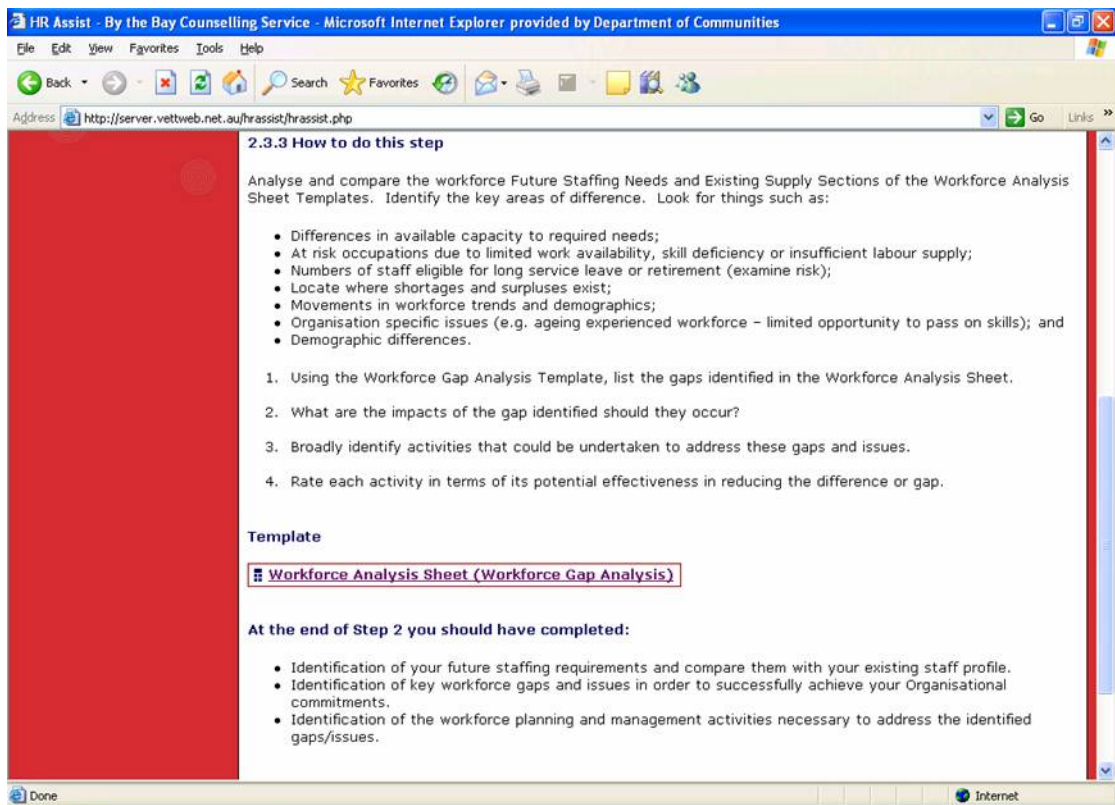
A gap analysis is a valuable component of the workforce planning process as it provides an assessment of:

- what you have
- what you need, and
- results in your gap analysis.

Once a gap has been identified, you are in a position to explore options to fill the gap.

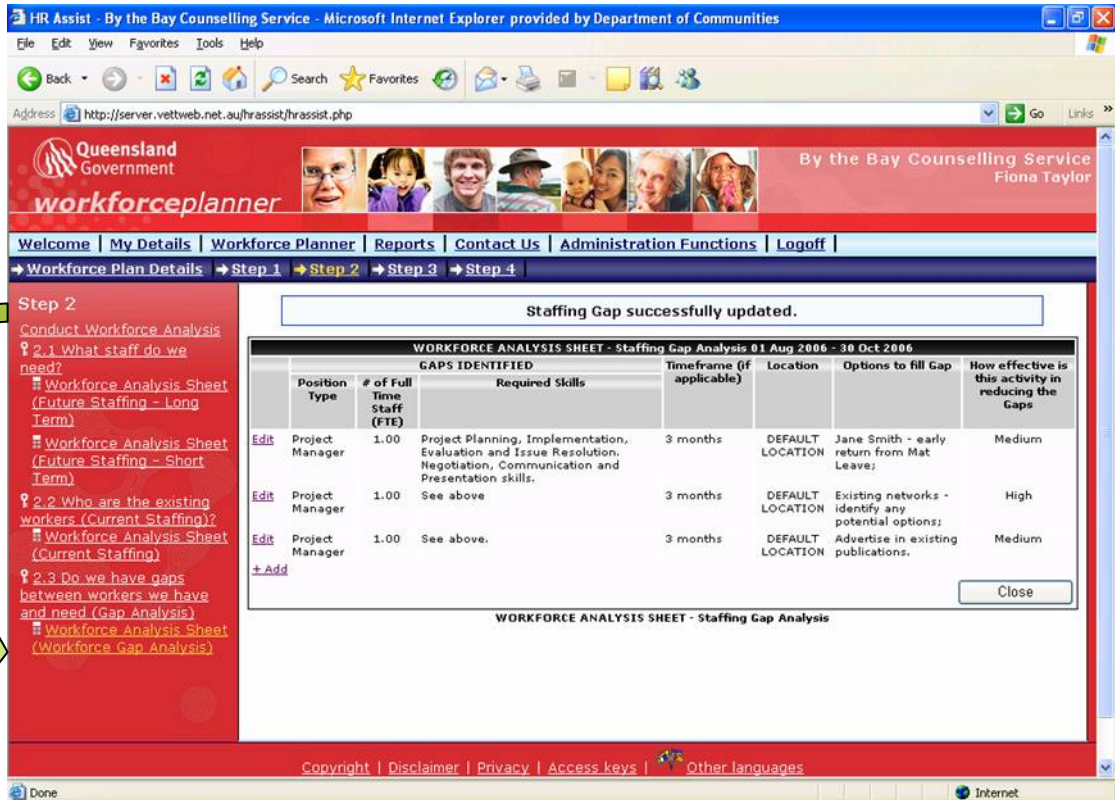


Gap analysis — screen 1



Gap analysis — screen 2

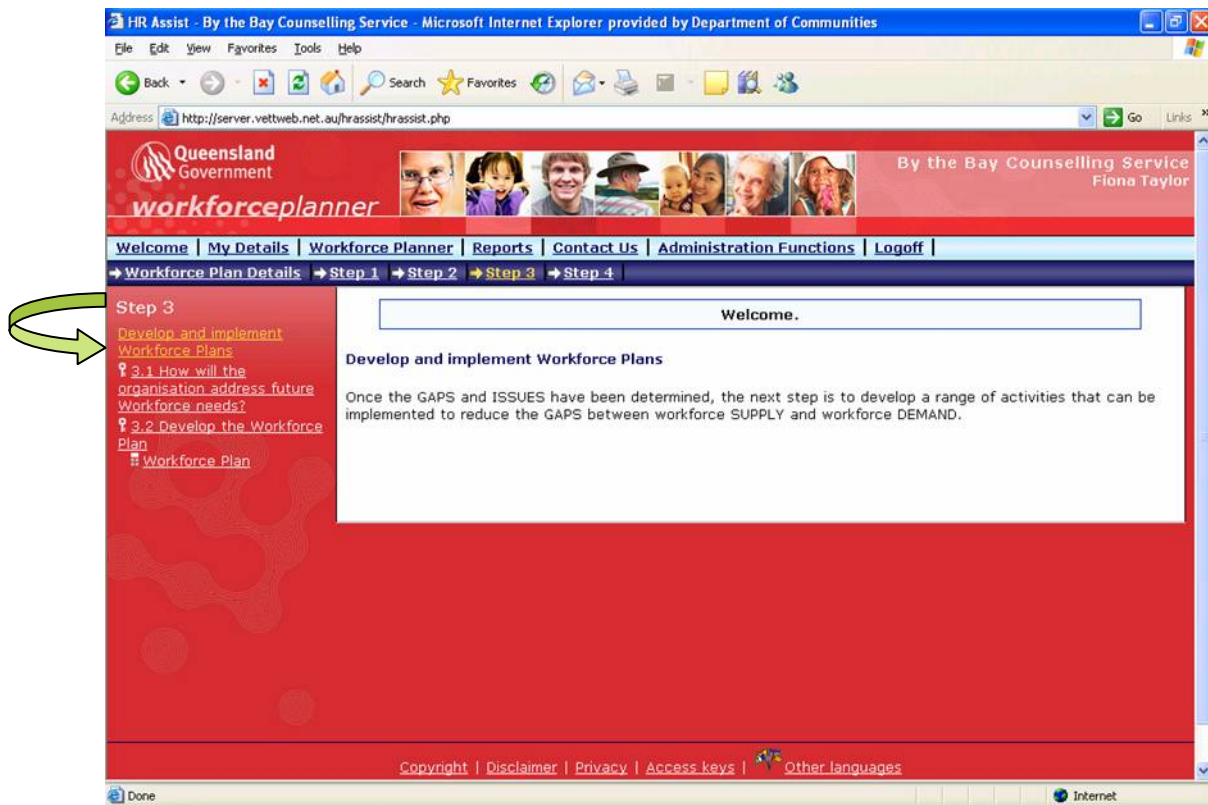
The gap analysis template helps reconcile the gaps between staff needs and current staff levels. Once gaps are identified, it is possible to document a range of activities to close the gaps. The project manager role for the service's retirement transition project is detailed as follows:



Workforce analysis sheet

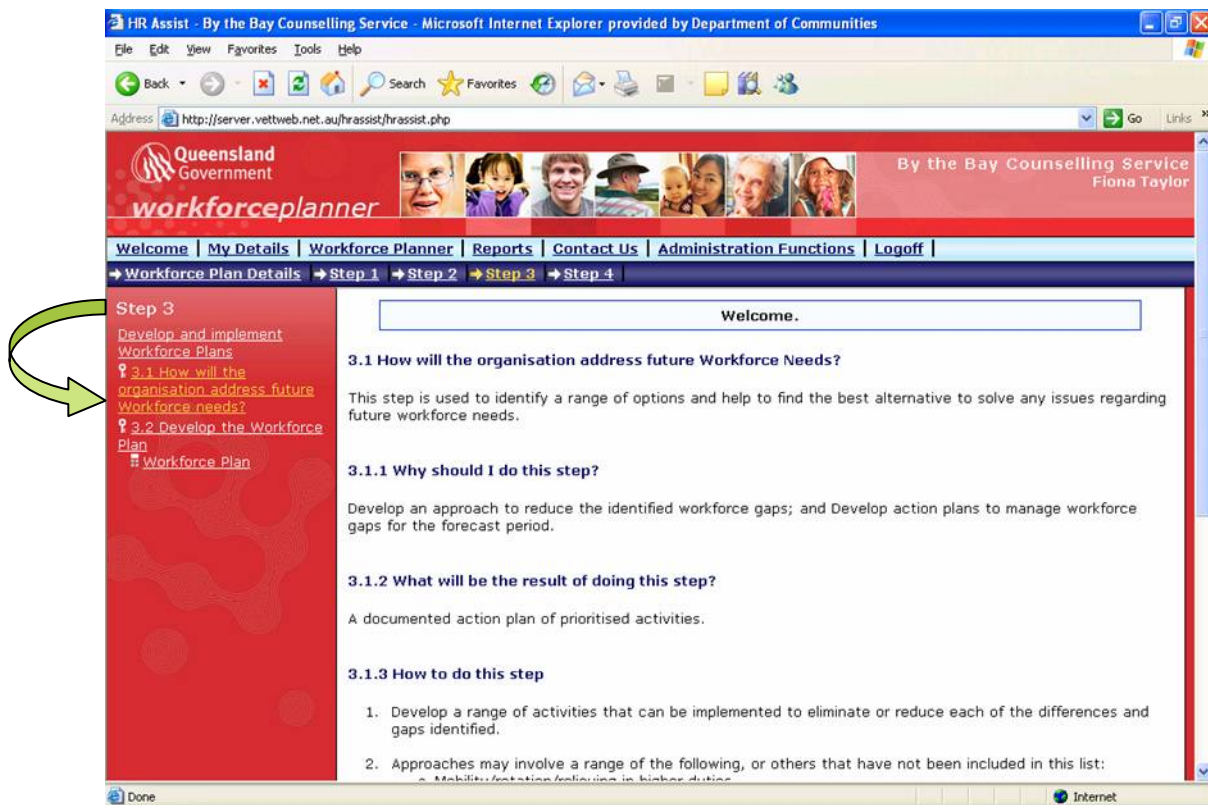
6 Step 3 — develop and implement workforce plans

This step is about what needs to be done as a result of your analysis and provides the opportunity to develop a range of solutions to meet your organisations document requirements.

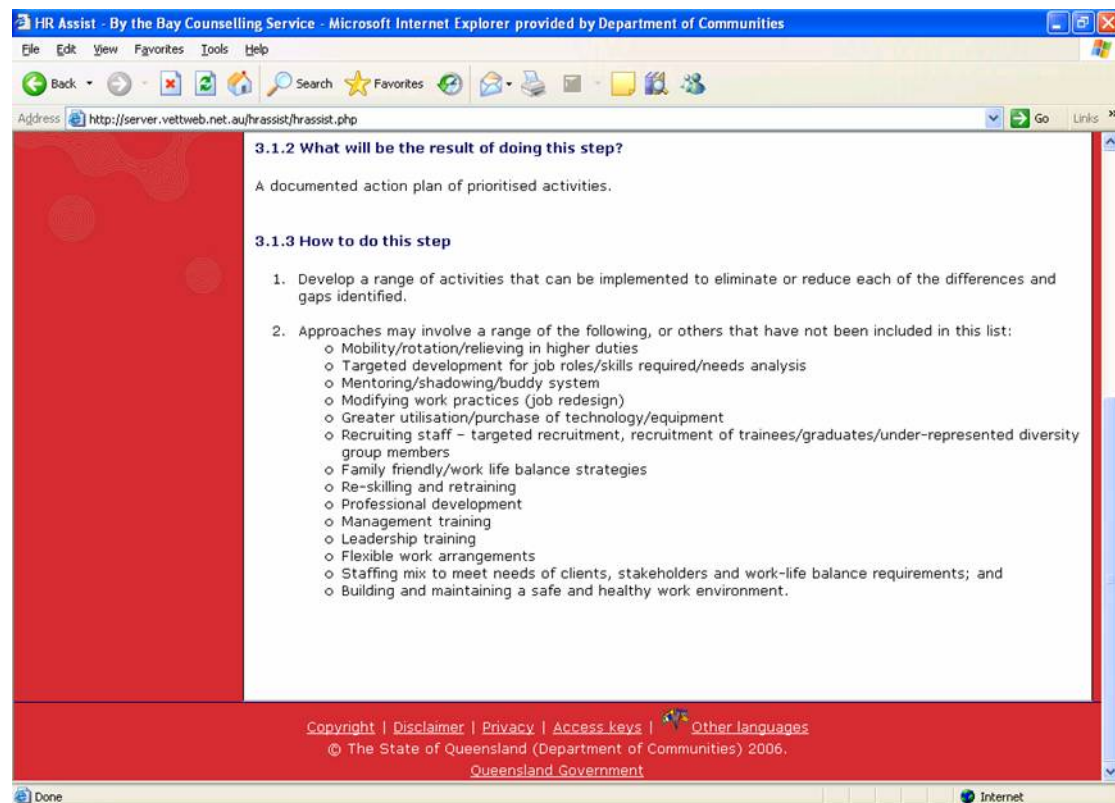


Develop and implement workforce plans — screen 1

6.1 Key activity 3.1 — how will your organisation address future workforce needs?

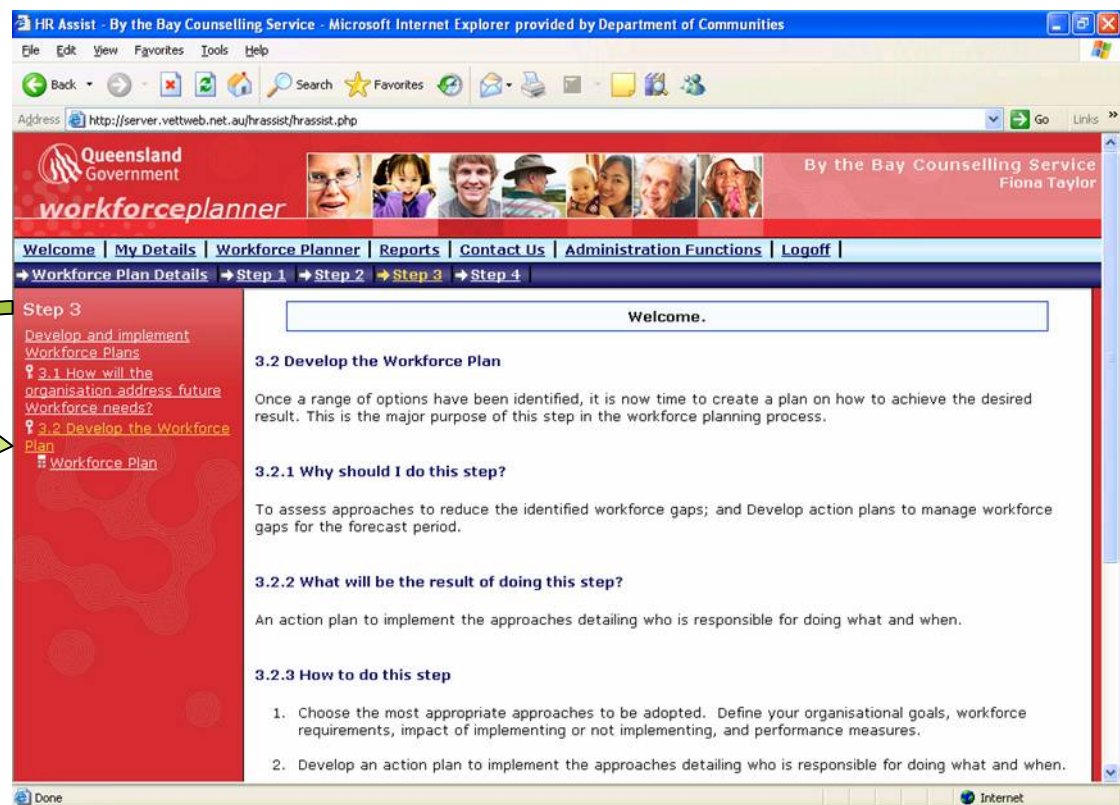


How will your organisation address future workforce needs? — screen 1

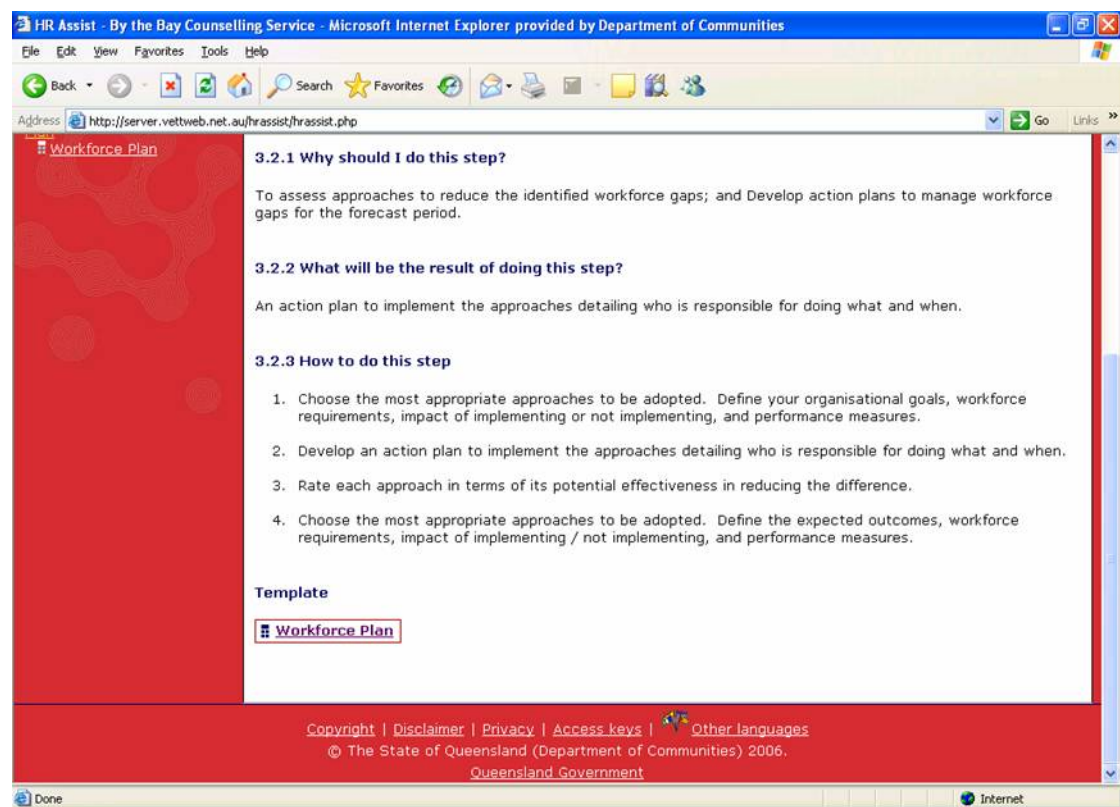


How will your organisation address future workforce needs? — screen 2

6.2 Key activity 3.2 — develop the workforce plan



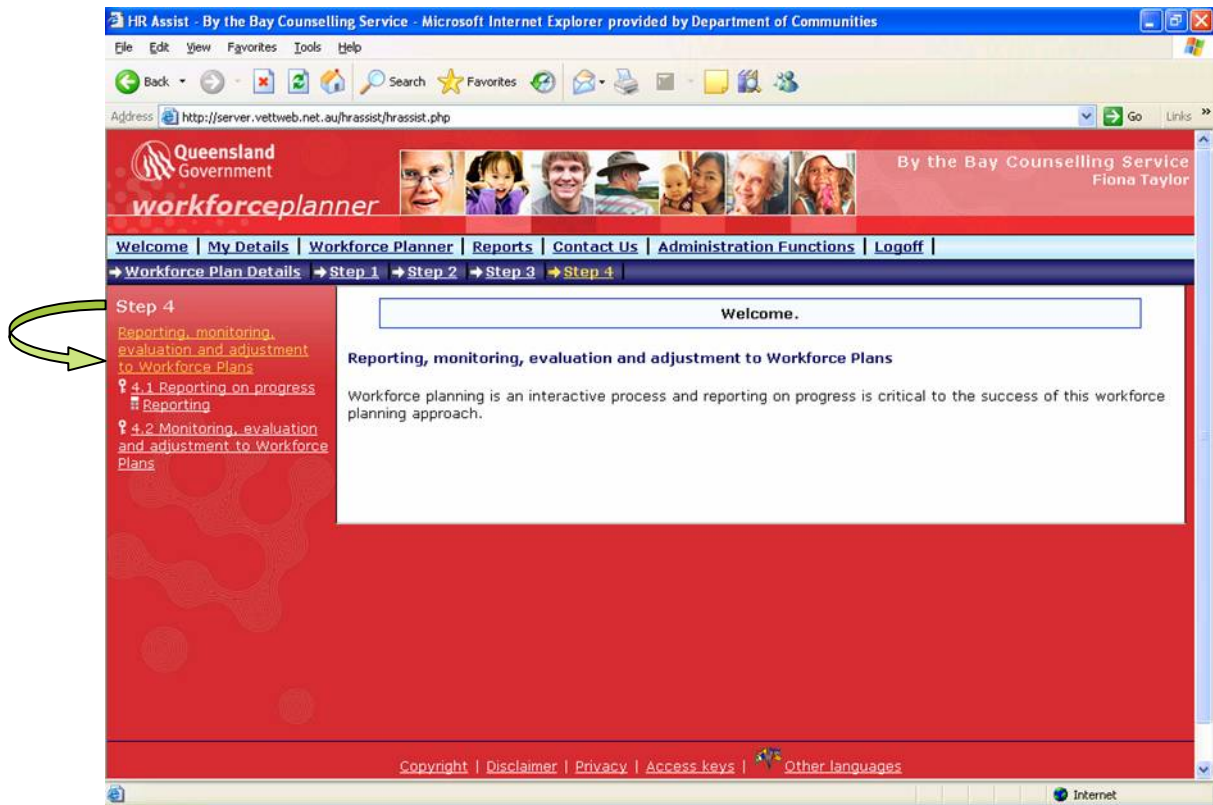
Develop the workforce plan — screen 1



Develop the workforce plan — screen 2

Step 4 — report, monitor, evaluate and adjust workforce plans

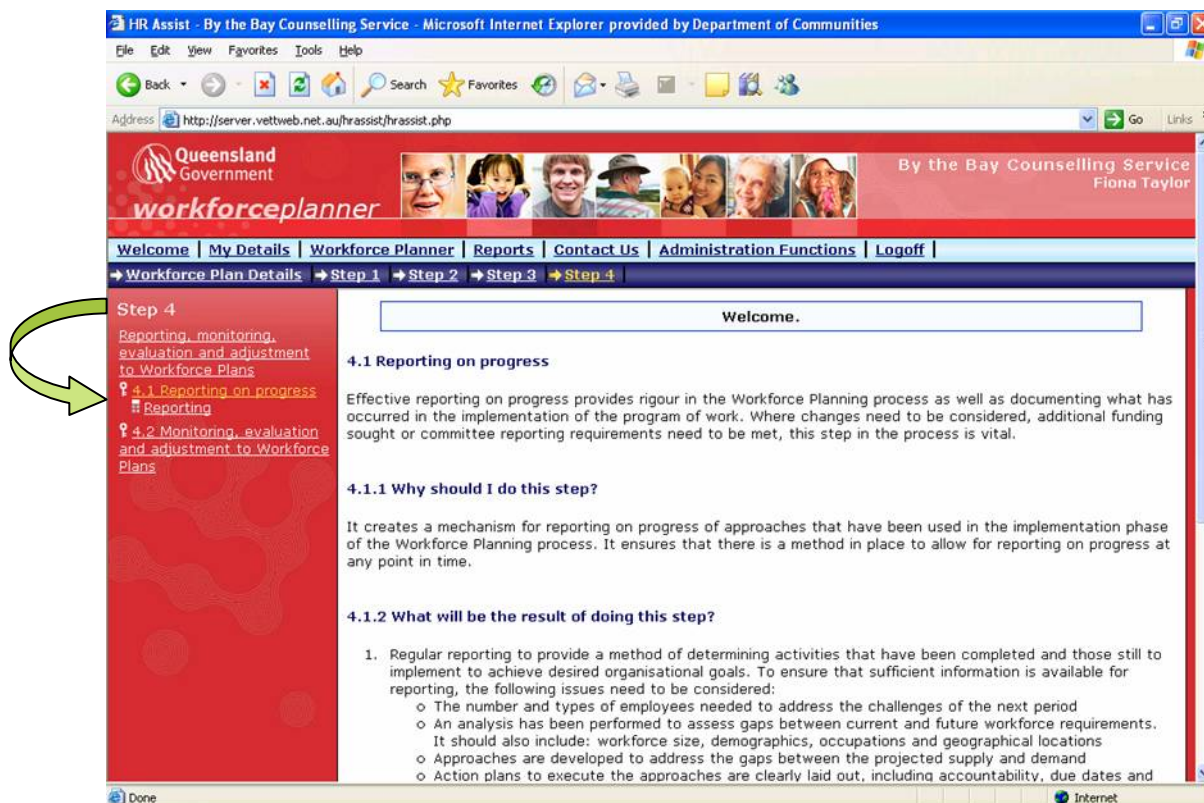
The reporting template provides an opportunity to document how your organisation's plan is progressing.



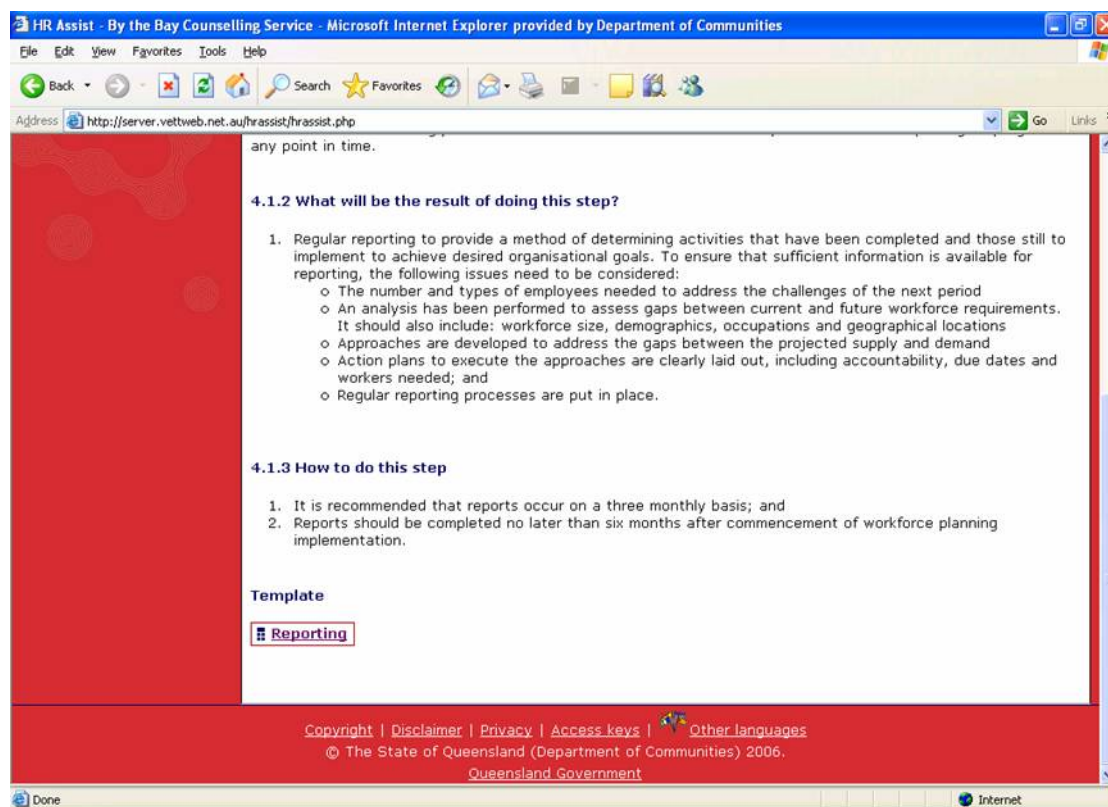
Reporting, monitoring, evaluation and adjustment to the workforce planner

6.3 Key activity 4.1 — reporting on progress

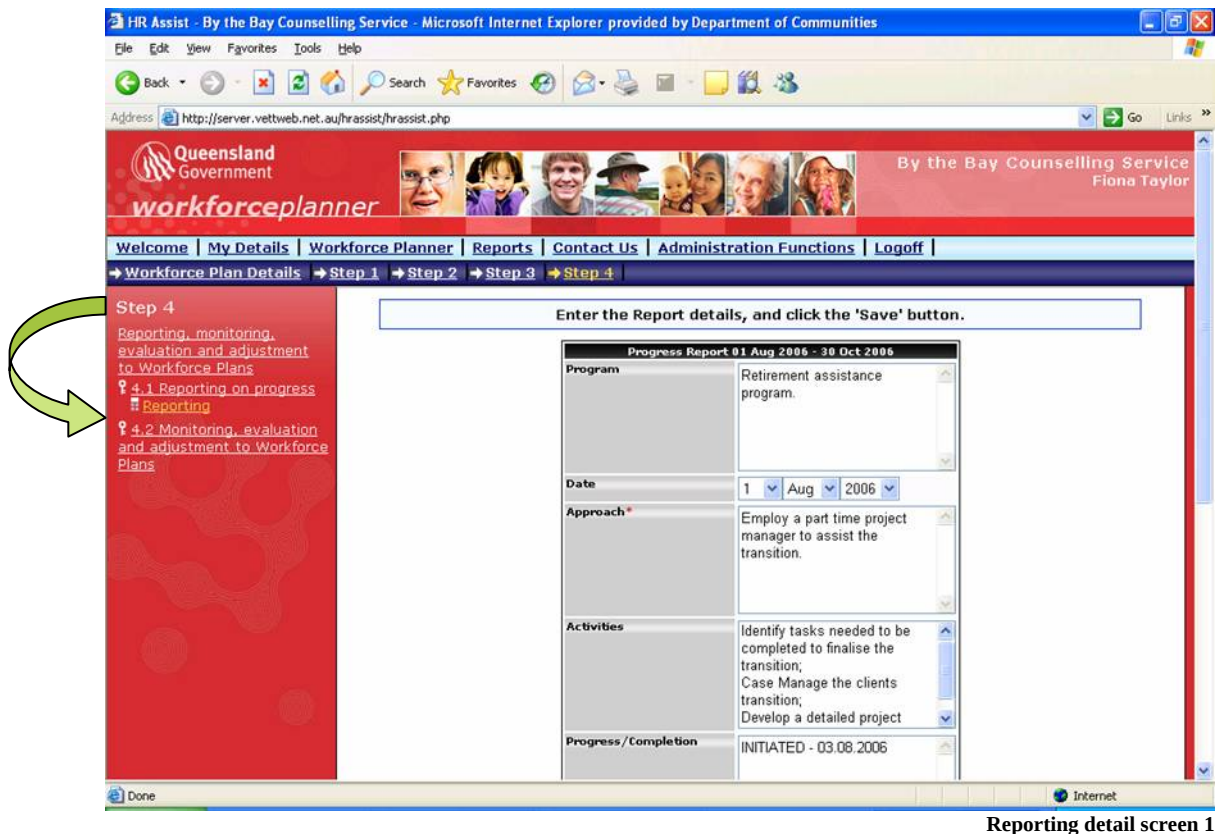
Reporting on your plan's progress may occur at any time. Where changes or decisions affect your workforce plan it is important to capture them to ensure the plan's currency is maintained.



Reporting on progress — information screen 1



Reporting on progress — information screen 2



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Workforce Plan Details Step 1 Step 2 Step 3 Step 4

Step 4
[Reporting, monitoring, evaluation and adjustment to Workforce Plans](#)
 4.1 Reporting on progress
 Reporting
 4.2 Monitoring, evaluation and adjustment to Workforce Plans

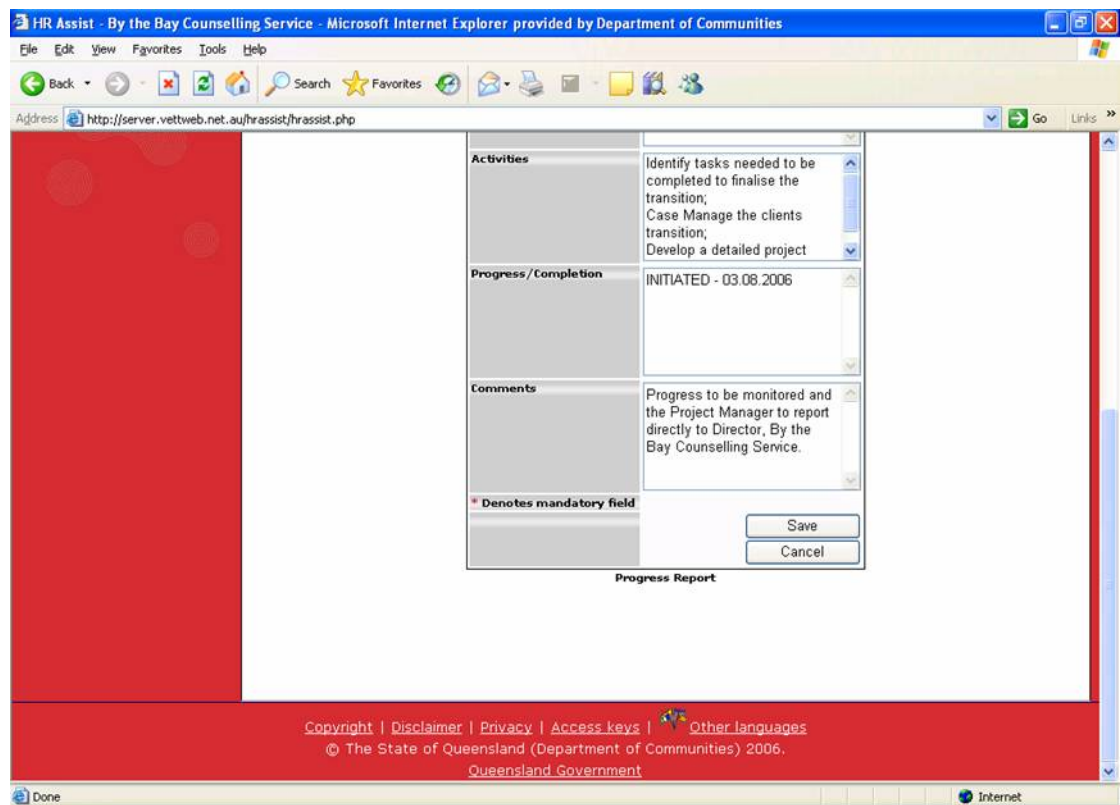
Enter the Report details, and click the 'Save' button.

Progress Report 01 Aug 2006 - 30 Oct 2006

Program	Retirement assistance program.
Date	1 Aug 2006
Approach*	Employ a part time project manager to assist the transition.
Activities	Identify tasks needed to be completed to finalise the transition; Case Manage the clients transition; Develop a detailed project
Progress / Completion	INITIATED - 03.08.2006

Done Internet

Reporting detail screen 1



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Activities

Identify tasks needed to be completed to finalise the transition;
Case Manage the clients transition;
Develop a detailed project

Progress / Completion

INITIATED - 03.08.2006

Comments

Progress to be monitored and the Project Manager to report directly to Director, By the Bay Counselling Service.

* Denotes mandatory field

Save Cancel

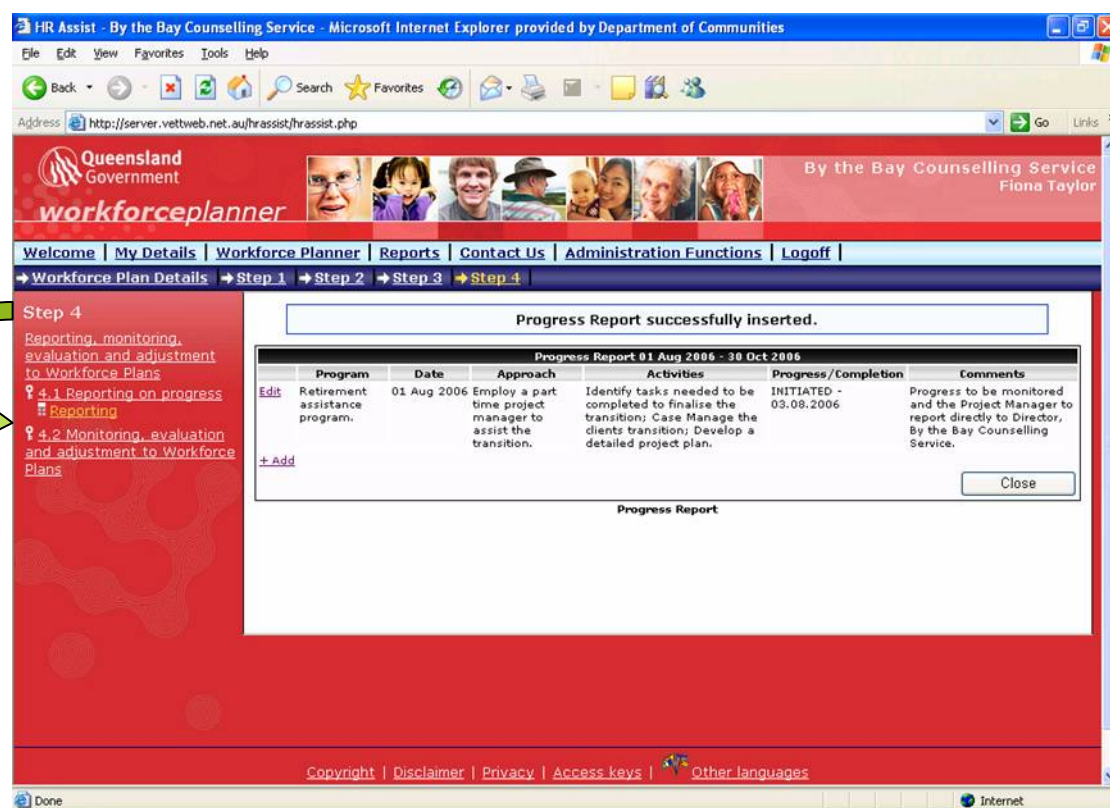
Progress Report

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Done Internet

Reporting detail screen 2

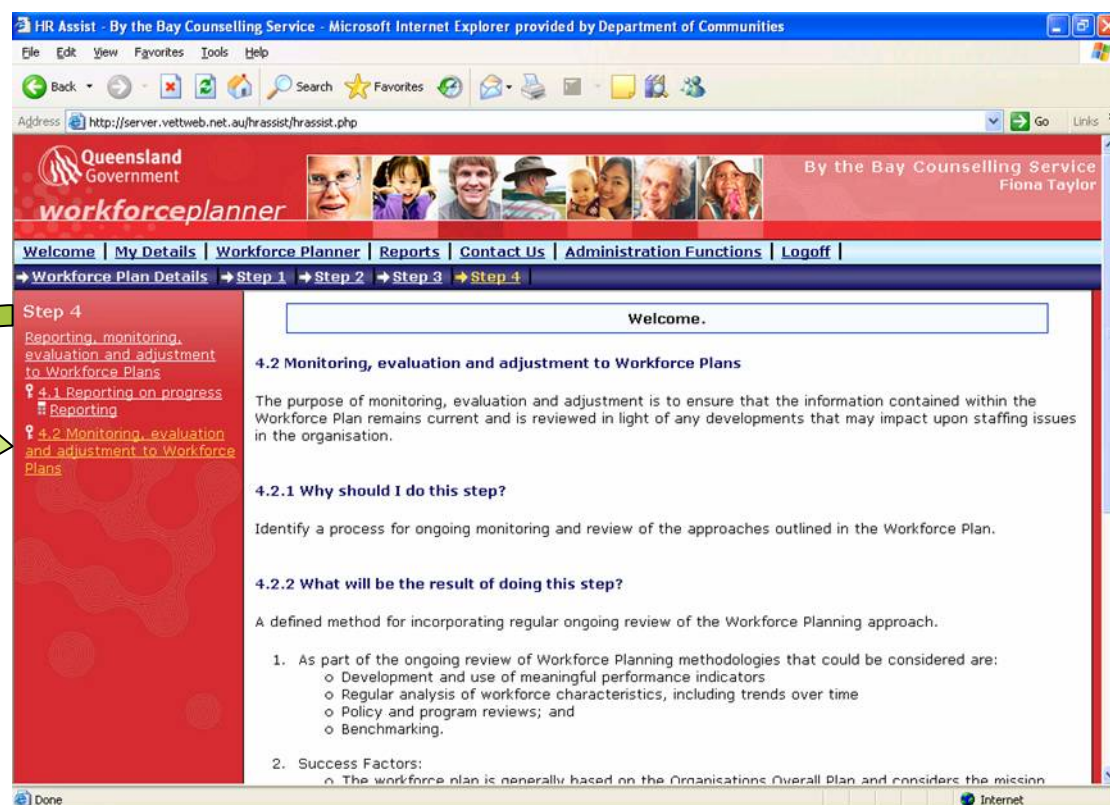
The reporting template allows you to monitor and document plan activities. These will appear in the final workforce plan report and provide an historical record of activities that have taken place as part of your workforce plan.



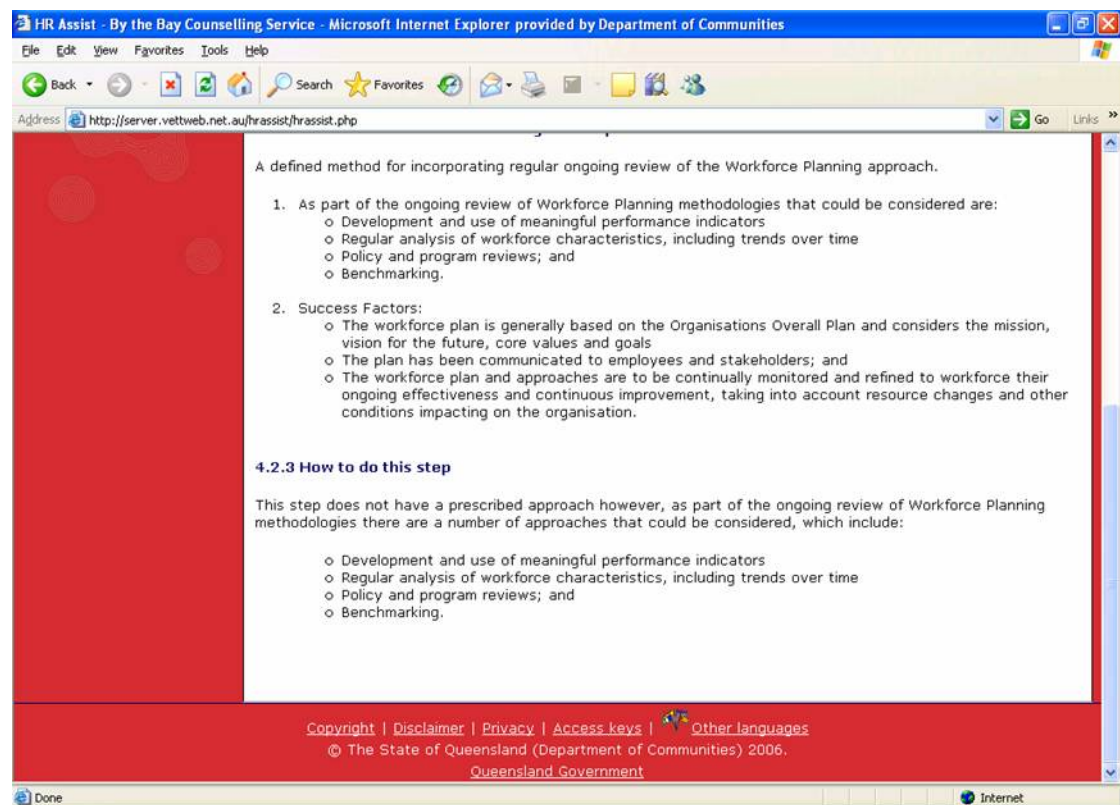
Reporting list screen 1

Once the data is saved it will appear in the above format, which provides a snapshot of reporting activities over time.

6.4 Key activity 4.2 — monitoring, evaluation and adjusting workforce plans



Monitoring, evaluating and adjusting workforce plans — information screen 1

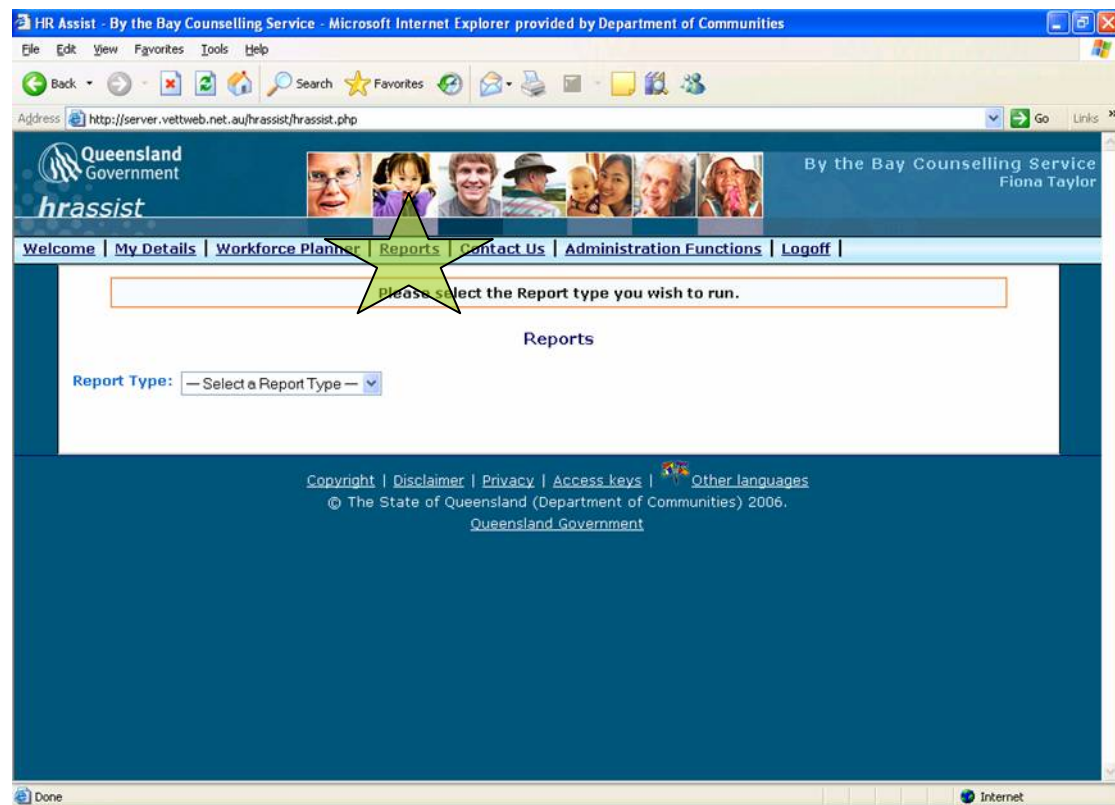


Monitoring, evaluating and adjusting workforce plans — information screen 1

As stated in 4.2.3 How to do this step, there is no template or screen to monitor the evaluation, monitoring or adjusting process. However, the reporting template provides an opportunity to report on upcoming activities as well as finalised ones. Your organisations reporting methods are often the best way to record project/program progress.

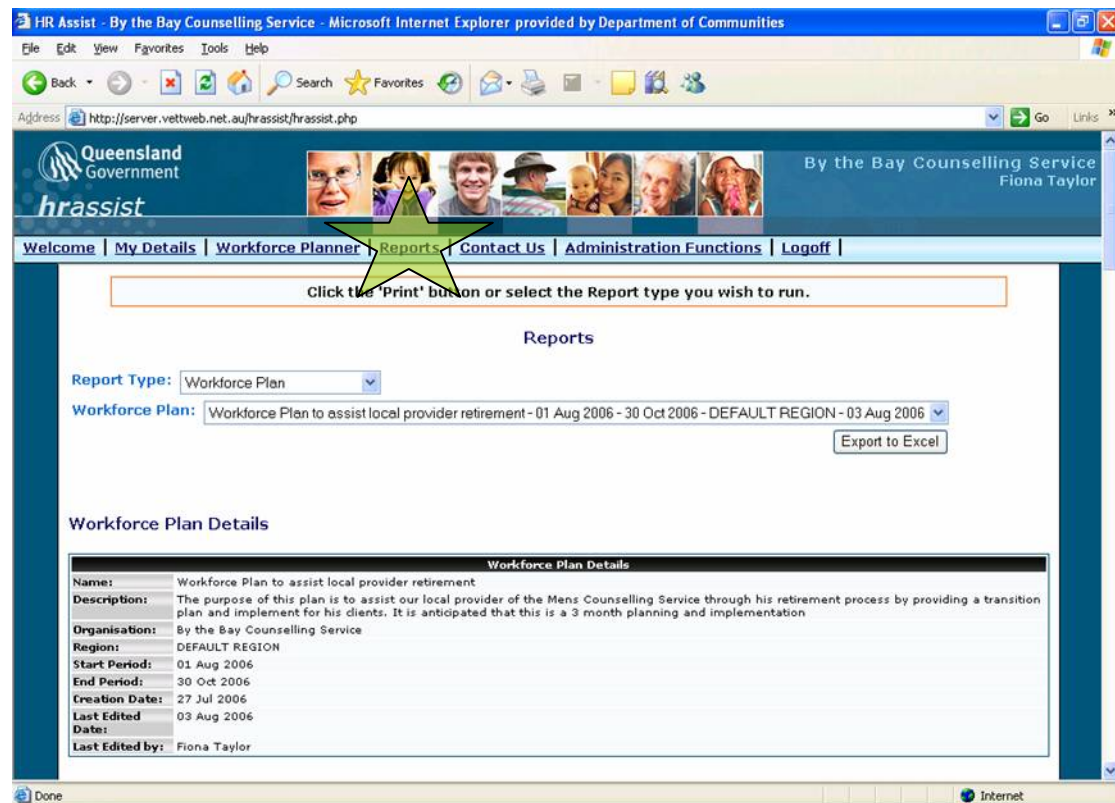
7 Workforce plan report

All the data captured in the workforce planning process culminates in the final workforce plan report. To run the workforce plan report, select 'reports' from the primary toolbar.



Reports selection screen

Using the By the Bay Counselling Service retirement process as an example, you would make the selection as follows:



Reports output screen

This is a lengthy report, therefore only the first screen has been displayed in this document. There is also an option to 'export to Excel' if you would like to manipulate the information and use it as an example in other reports, business cases or planning documents.

If this pop-up appears when you are attempting to export the report to Excel, right click in the yellow area and choose 'download file'.



The following pop-up will then appear offering the opportunity to save your workforce plan as an Excel spreadsheet and continue to amend data in your reports.

